

**THE CONSOLIDATION OF ALLEGHANY COUNTY AND COVINGTON CITY
PUBLIC SCHOOLS: A CASE STUDY**

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ABSTRACT

Many factors can threaten the financial viability of communities, including an aging population and a lack of viable local industries and job opportunities that result in the out-migration of the workforce—both of which can result in a reduction of school-aged children within certain towns and regions. Hence, communities facing such challenges must consider ways to economize so that they can provide as many essential services as possible, and of a quality that best serves the local population. The consolidation of school divisions is one strategy to consider when localities are struggling financially and the numbers of students are declining.

School consolidation is not a common occurrence in the U.S., which is why there is limited available research on the topic. In late-January 2021, the Virginia Board of Education voted unanimously in favor of the consolidation of Alleghany County and Covington City school divisions within the Alleghany Highlands, which is a region in Western Virginia beset by economic challenges and a declining population. This is the first consolidation of school divisions to be approved in the Commonwealth of Virginia since 2014, and only the third consolidation to occur since 1982. The purpose of this qualitative study was to understand the factors that led to the consolidation of Alleghany County Public School and Covington City Public Schools through an analysis of historical artifacts and interview data obtained from two composite groups of respondents with deep knowledge of the process: (a) current and/or former school employees (e.g., former and current superintendents and finance directors), and (b) current elected or appointed officials and community members from either Alleghany or Covington (e.g., council members and school board members). Three research questions guided this study: (1) What factors led to the decision to consolidate the school divisions of Alleghany County and Covington City? (2) Since this is not the first time that school division consolidation has been proposed in the Alleghany Highlands region, what factors were different or why were the factors weighed differently this time? (3) What role did funding made available by the General Assembly play in this decision?

The findings obtained from interviewees were analyzed based on the most-cited factors to the least-cited factors. Among the prevalent themes that emerged from the qualitative data were the importance of trust and open lines of communication from the inception of the process, the good working relationships of those driving the process, community buy-in, and taking into account the regional identity and pulse of the community in decision-making. Also found to be important was illustrating how the consolidation would benefit students in increased course offerings. Given that only three school division consolidations have occurred in the Commonwealth of Virginia in almost four decades, it is expected that a record of the events and essential factors that were found to be pivotal in the decision to consolidate these two school divisions in the Alleghany Highlands could be useful to other school divisions, both in Virginia and elsewhere in the U.S. that might be considering a similar decision for both the fiscal health of the local communities and the best pedagogical outcome for students.

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GENERAL AUDIENCE ABSTRACT

Many factors can threaten the financial viability of communities (e.g., an aging population and reduced job opportunities), which can result in a reduction in the number of school-aged children within certain towns and regions. Hence, many smaller, often rural, communities look to school consolidation as one strategy to consider when localities are struggling financially, and the numbers of students are declining.

The purpose of this qualitative study was to understand the factors that led to the consolidation of Alleghany County Public School and Covington City Public Schools (located in the Alleghany Highlands region in far Southwest Virginia) through an analysis of historical artifacts and interview data obtained from two composite groups of respondents with deep knowledge of the process: (a) current and/or former school employees (e.g., former and current superintendents and finance directors), and (b) current elected or appointed officials and community members from either Alleghany or Covington (e.g., council members and school board members). Three research questions guided this study: (1) What factors led to the decision to consolidate the school divisions of Alleghany County and Covington City? (2) Since this is not the first time that school division consolidation has been proposed in the Alleghany Highlands region, what factors were different or why were the factors weighed differently this time? (3) What role did funding made available by the General Assembly play in this decision?

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Dedication

This dissertation is dedicated to two people: one in my past and one in my future. First, I dedicate this doctoral journey to my late-grandfather, William “Bill” Jones, who taught me so much about the importance of hard work and doing the right thing. Second, I dedicate this dissertation to my soon-to-be-born son, William, who will be named after his great-grandfather: *Will, I hope that one day when you are old enough to understand just how challenging at times this degree process was, that you too will know that you accomplish anything you set your mind to, no matter how formidable it might first seem to you.*

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CHAPTER ONE: INTRODUCTION TO THE STUDY

Statement of the Problem

On January 28, 2021, the Virginia Board of Education voted unanimously in favor of the consolidation of Alleghany County and Covington City school divisions. This is the first consolidation of school divisions to be approved in the Commonwealth of Virginia since 2014, and only the third consolidation to occur since 1982. Given that it is such a rare occurrence in the Commonwealth of Virginia, this most recent consideration of consolidation deserves to be examined closely. While this amalgamation represents a significant change for these two communities, it is not a new concept for this region. The school divisions of Alleghany County and Clifton Forge were consolidated in 1982.

Understanding how the consolidation process was initiated and has evolved over time served as the foundation for this qualitative case study. The study has potential significance in that describing the consolidation of the school divisions in Alleghany County and Covington City may impact the decision-making process of other localities. Moreover, while the local conditions in Alleghany County and Covington City are unique to their communities, the larger application of the consolidation process and its costs and benefits could be applied in other localities. In terms of data collection, interviews were used as the primary source of information, coupled with a thorough analysis of archival materials in order to understand the entirety of the process.

Alleghany County and Covington City have discussed the idea of combining into one consolidated school division off and on for nearly 50 years. Local reports indicate that discussions about a potential merger began about ten years after Covington formed its own school division in 1958. Since that time, multiple feasibility studies were conducted, including

one in 2019. Previous iterations of similar studies were commissioned in the early 1980s and again in 2009. In the early 1980s, the City of Clifton Forge, the City of Covington, and Alleghany County came close to forming a consolidated school division; however, the support from the Covington City Council was not sufficient to pass the measure in Covington. In contrast, Alleghany County and Clifton Forge moved forward and merged their school divisions. Since that time, school division consolidation has remained a recurring topic in Covington City and the Alleghany Highlands region. Appendix A provides a timeline that illustrates the various events that have transpired over roughly the last five decades, which ultimately led to the consolidation of the school divisions in Alleghany County and Covington City.

Due to the overall declining population in this region, over recent years it has become more a question of “when” and less a question of “if” this consolidation would occur. The school-age population has also declined precipitously in Alleghany County over the last 15 years. This downward trend can be seen in Appendix B, which shows enrollment by grade level in Alleghany County Public Schools since the 2005-2006 school year. During that time span, Alleghany County has experienced a decrease of 976 students in total enrollment. Total enrollment in Covington City Public Schools has been much steadier and has even risen slightly over the same duration; specifically, total enrollment in Covington City schools has increased by 146 students since the 2005-2006 school year (Appendix C). Finally, Appendix D provides the total enrollment of students in the Alleghany County and Covington City schools had the two entities been combined in the 2005-2006 school year. Note that some of these enrollment trends might have been impacted by the mobility of students between school divisions, since neither school division charges tuition to students who want to attend their schools but reside outside of their boundaries. Overall, these numbers confirm that the steep decline in enrollment in

Alleghany County clearly outweighs the small gains in enrollment experienced by Covington City; specifically, the overall enrollment of the combined divisions would have decreased by 830 students, or 22%.

Purpose of the Study

This study was designed to describe the process by which the decision was made to consolidate the school divisions in Alleghany County and Covington City. To fully appreciate the dynamics that led to this decision, one must understand not only the specific local factors that impacted this merger, but also have some sense of the school division consolidation process in Virginia as outlined in the Code of Virginia. In 2019, the Alleghany County and Covington City school boards formed a Joint School Services Committee (JSSC) to develop a consolidation plan. The move was initiated in response to concerns in both school divisions about declining student enrollment, and recognition that the pooling of resources could lead to the expansion of opportunities for students in the combined school division. A single public hearing was held in both localities in September 2020. Additionally, as required by Virginia statute §22.1-25, which mandates that “public support for the measure must be demonstrated,” the JSSC developed and administered a survey instrument to gauge the community’s views on the proposed consolidation.

According to the final presentation made to the Virginia Department of Education, the survey results indicate that the instrument was administered to 100 residents of the region. Interestingly, only 25 residents from Covington took the survey while the remaining 75 respondents were from Alleghany County. While the resolution eventually presented to the State Board of Education cited the results of this survey as “narrowly in favor” of consolidation, there was little information available as to how the sample group was selected, when the survey was

administered, or in what context the survey was presented to potential respondents (e.g., did it evidence any bias?). Accordingly, it is critical to consider what elements led to the decision to consolidate these two school divisions, particularly since support from residents was mixed.

Significance of the Study

Since school division consolidation in Virginia is such an infrequent occurrence, it is important to thoroughly analyze the events leading to such a decision each time that it does occur. In Virginia, school division consolidation most commonly occurs as a byproduct of a city municipality reverting to town status, which is a process known as reversion. When a reversion takes place, the existing county school system is required to absorb the city school division, therefore creating a consolidated school division.

It is possible, however, for two school divisions to be consolidated without combining two local governing bodies through reversion. If school consolidation occurs independently of any changes in city or town status, then it requires the approval and consent of their local governing bodies. In the specific instance being studied, the Board of Supervisors in Alleghany County and the City Council in Covington had to adopt resolutions to endorse the merger of the two school divisions. It will be beneficial not only for those involved in this process, but also for those outside of the Alleghany Highlands region, to understand the process leading up to the decision to consolidate. Other localities or school divisions may look at the Alleghany-Covington merger as an example for future consolidations across the Commonwealth of Virginia.

To provide context for the financial aspects of this consolidation, the General Assembly in Virginia appropriated \$1.2 million dollars for FY2022, plus an additional \$582,000 in funding for each of the following three years, to be provided to the newly formed school division to assist

with the merger process. This decision represents a significant development since previously the hold harmless provision, which allowed for the use of the lower of the two local composite indexes (LCI) between two divisions, was the primary financial inducement for school division consolidation in Virginia.

The primary mechanism used to determine how much local funding must be provided to a municipality—versus how much comes from the state—is referred to as the *Composite Index of Local Ability to Pay* (sometimes referred to as *the Local Composite Index* or *LCI*). According to the Virginia Department of Education website (n.d.), *LCI* is defined in this way:

The Composite Index determines a school division’s ability to pay education costs fundamental to the commonwealth’s Standards of Quality (SOQ). The Composite Index is calculated using three indicators of a locality’s ability-to-pay:

- True value of real property (weighted 50 percent)
- Adjusted gross income (weighted 40 percent)
- Taxable retail sales (weighted 10 percent)

Each locality’s index is adjusted to maintain an overall statewide local share of 45 percent and an overall state share of 55 percent. (para 1)

In 2014, the Joint Legislative Audit and Review Commission (JLARC) conducted a study that ultimately recommended the discontinuation of the use of the lower LCI as an incentive to encourage school division consolidation, given that it became very costly for Virginia to fund. Instead, JLARC recommended direct payments to the localities to assist with the costs incurred during and after consolidation. The process in Alleghany County and Covington City has played out exactly as prescribed in that JLARC study. It should be noted that at the time this dissertation was written in 2021, Alleghany already had a lower LCI (0.2819) compared to Covington

(0.2913), so there would have been little benefit to this request from the localities. What is important to stress is that the consolidation between Allegheny County and Covington City was the first occurrence where the use of the lower LCI was not utilized as the primary motivating factor; instead, a lump-sum payment was provided to assist with the process. The projected impact of this decision to consolidate will be of great significance—not only for Allegheny County and Covington City—but potentially for other school divisions that are watching closely to see how the process plays out.

Research Questions

Miles et al. (2014) stated that a study's research questions represent the facets of inquiry that the researcher most wants to explore. Research questions may be general or particular, descriptive or explanatory. The formulation of research questions may precede, follow, or happen concurrently with the development of a conceptual framework.

To reiterate, this study was designed to gain insight into the past, current, and anticipated future developments of the consolidated school division being formed between Allegheny County and Covington City Public Schools. The following three questions directed this study:

RQ1: What factors led to the decision to consolidate the school divisions of Allegheny County and Covington City?

RQ2. Since this is not the first time that school division consolidation has been proposed in the Allegheny Highlands region, what factors were different or why were the factors weighed differently this time?

RQ3. What role did funding made available by the General Assembly play in this decision?

Justification of the Study and Organization

There is a decided lack of available recent and relevant research that can be used to understand the process of school division consolidation in Virginia. This deficit stems, in part, from the fact that it is not a common occurrence in the Commonwealth. Additionally, when a consolidation has been implemented in Virginia, the circumstances associated with each occurrence have all been unique. Creswell (2018) stated that case study research begins with the identification of a specific case that will be described and analyzed. Following that assertion, this investigation's chosen case study is the school division consolidation that would be occurring between Alleghany County and Covington City Public Schools. The findings presented in this dissertation are expected to add to the available research on this topic.

The organization of this study and its findings rely on the discovery, analysis, and correlation of information obtained from primary and secondary sources. As stated by Creswell (2018),

A hallmark of a good qualitative case study is that it presents an in-depth understanding of the case. In order to accomplish this, the researcher collects and integrates many forms of qualitative data, ranging from interviews, to observations, to documents, to audiovisual materials. Relying on one source of data is typically not enough to develop this in-depth understanding. (p. 98)

An in-depth evaluation of these resources, coupled with first-hand information gained from personal interviews, will lead to a more nuanced understanding of the past events that have steered the region to this course of action. This study was designed to be completed prior to the two school divisions formally consolidating in July of 2022. The findings presented and discussed herein are expected to create a strong foundation for future studies that have the

benefit of “looking back over time” at the combined school division. As can be seen in Appendix E, the overall school enrollment for the to-be-combined school division is steadily declining. This decrease is significant considering that average-daily-membership is the primary metric that the state uses for determining the funding owed to each locality.

Summary

This case study was designed and conducted in order to analyze and better understand the myriad factors that led to the school division consolidation between Allegheny County and Covington City. The information is presented and organized in five chapters. Chapter One provided a statement of the problem, the context for the study, the research questions that guided this investigation, and the justification for conducting this study.

Chapter Two consists of a review of the relevant literature on the topic of school consolidation. Research was conducted to analyze a significant number of the proposed costs and benefits to this process. As will be demonstrated within Chapter Two, there are no shortage of factors to consider or potential impacts of school division consolidation. The design of the study is discussed in Chapter Three, including a description of the methodology and justification for the chosen procedures and techniques. Chapter Four is devoted to reporting the findings of the data-collection process. In particular, the material gleaned from interviews with key actors proved to be instrumental in understanding the impacts of the decision to consolidate the two school divisions. Finally, Chapter Five offers conclusions on the costs and benefits of the consolidation. Recommendations for the remainder of the process are also discussed in this final chapter of the dissertation.

CHAPTER TWO: A REVIEW OF THE LITERATURE

Introduction to School Division Consolidation

This chapter presents the relevant literature and research on the topic of school division consolidation in the United States, with a focus on the Commonwealth of Virginia and even certain areas within the state. From the outset is important to establish a definition for the terms that will be used in this paper because researchers often use them interchangeably. Strang (1987) provided a succinct definition of *school division consolidation* as follows: “the merging of two or more divisions into one” (p. 352). Brasington (1998) noted that a consolidated school division is sometimes formed by combining two municipalities. More recently, Howley et al. (2011) expanded on these straightforward descriptions to say that consolidation can include both the combining of divisions and the closing of schools, as well as sending students to other schools or building newer and larger schools. This study focuses primarily on the consolidation of school divisions, which can often result in the closing of individual schools. However, school closures are not the focus of this study; accordingly, it will be noted when the closing of schools is being discussed as a matter independent of division consolidation.

Over time, a community will inevitably evolve in terms of its local businesses and industries, in- and out-migration, the demographic profile of its residents, its financial health and welfare, and a range of other factors. These community transformations can lead to changes that are both unwanted and challenging for community members and local residents. As it pertains to the current study, an aging population, a lack of viable local industries and job opportunities that result in the out-migration of the workforce, and other factors can easily result in outcomes that threaten the financial viability of communities. Hence, such communities must consider ways to economize so that they provide as many essential services as possible.

The consolidation of school divisions is one strategy to consider when localities are struggling financially. Initially, it might appear that combining two divisions would result in immediate savings in the form of reduced infrastructure costs, fewer teachers to pay, and a reduction in administrative costs. However, as this review of the literature will show, there is no shortage of factors that can tilt the scales either in favor of or in opposition to those perceived benefits.

In some states it is not uncommon for state policies to require division consolidation if enrollment levels drop below a certain threshold, putting certain schools at risk for being inefficient and a drag on the local tax base. In other states, poor student achievement outcomes can lead to the discussion of mergers as a possible avenue towards improvement. While in other states or localities, local government mergers can result in the eventual consolidation of school divisions. One common theme among all of these scenarios is that economic impacts are usually at the forefront of these discussions and decisions.

Although certain circumstances (e.g., a dramatic reduction in school-age children in, say, a more rural community) would seem to call for school consolidation, most such decisions are far from straightforward. Indeed, there has been a history of litigation involving citizens who disapprove of a sanctioned plan to consolidate school divisions; these appeals, however, have rarely altered the trajectory of the initial decision. One such case occurred in 1966 when the Minnesota Supreme Court considered the *Appeal of Schluter* (1966), which heard from citizens who appealed the consolidation of Sedan School Division No. 613 with neighboring Glenwood School Division No. 612 and Brooten School Division No. 737. The consolidation process proposed by area's superintendent and approved by voters was to occur without a complete dissolution of the Sedan School Division. Local residents from the Sedan division appealed the

decision to the Division Court and eventually to the Minnesota Supreme Court. In the end, the Minnesota Supreme Court ruled that “The actions of the Superintendent and Commissioner of Education were not arbitrary, fraudulent, capricious, or oppressive, or in unreasonable disregard of the best interests of the territory affected and held both orders of consolidation valid” (p.484). This ruling represents an important precedent demonstrating that courts are unlikely to interfere in a school division’s consolidation process so long as decision-makers follow agreed-upon policies. Further reinforcing this point that courts are unlikely to intervene, and that litigation directed at school division consolidation is nothing new, Gorda Jr. and Dorty (2013) wrote,

...it is apparent that courts are not an effective forum to resist state-compelled school division consolidation. Equal protection and due process claims are particularly unfruitful; the only viable legal theory appears to be claims that the negative effects of consolidation are so serious as to deny students their state constitutional rights to an adequate education. (p. 11)

There are numerous factors to consider when determining whether a school system should close or consolidate schools or merge with another school division. Some studies focus on the potential cost savings for school division operations when they consolidate into fewer sites through the development of economies of scale. While these financial impacts must be considered, other significant issues must be factored in as well—notably the costs associated with the transition of sites, the size of schools, and the impact on morale and public perceptions that such a change might bring about. Routinely touted as a method for improving school efficiency, consolidation represents an often-considered strategy for state and local governments seeking to improve effectiveness, particularly in rural school divisions (Cox & Cox, 2010). In contrast, there are also a number of valid reasons why division consolidation is viewed as

ineffective and unfair by some stakeholders. From an organizational perspective, one obvious consequence of closing school divisions is the automatic increase in the number of students that the existing (but now larger) or newly formed division must serve.

The cost/benefit analysis guiding these decisions is often far from straightforward; moreover, support can be found on both sides of the debate depending on the local conditions and wishes of each community. Duncombe and Yinger (2010) concluded that states would be prudent to encourage smaller divisions to consolidate. For those small divisions, which they defined as serving fewer than 1,500 students, economies of size are more likely to play a decision-making role. However, Duncombe and Yinger also acknowledged that there may be political or geographic barriers to consider; nonetheless, for smaller divisions they did find evidence that the potential for significant financial savings does exist. It must also be noted that other studies have differed on the question of whether consolidation does result in financial savings. In their review of the literature, Cox and Cox (2010) reported that while some researchers have found marginal fiscal gains for consolidated divisions, far more were unable to substantiate significant differences from a financial perspective. In fact, the Cox and Cox study, which focused on a post-consolidated school division in Hamilton County, Tennessee, found little evidence of financial gain.

The topic of school division consolidation is wide-ranging, with considerable available research covering numerous aspects of this concept. Studies referenced in this chapter have analyzed impacts on student achievement, division finances, curriculum offerings, and levels of community pride and morale. All of these variables must be considered from multiple perspectives, including from the school division leadership and staff as well as the local governing body or municipality. Overall, while it is true that the decision to consolidate or merge

school divisions tends to start and end with financial ramifications, those data points do not always tell the full story.

This chapter provides an assessment of the numerous considerations that must be taken into account when making decisions about the consolidation of school divisions. Chapter Two begins with a historical perspective, and then addresses division consolidation in states other than Virginia, the financial impacts of school division consolidation, considerations involving school size and its impacts on student achievement, community identity, and the effects of federal, state, and local policies on division consolidation. This chapter concludes with an analysis of the history of school division consolidation in Virginia.

The History of Education and Division Consolidation in the United States

Public schooling has not always been the predominant method for educating youth in the United States. Unger (2001) noted that prior to the early to mid-1800s, parents tended to be resistant to formal education as it their removed children from the home where they were part of the operation of maintaining a farm. During this time, therefore, education tended to take place at home. When formal schooling was available, it mostly consisted of rural families combining their efforts to form school communities. However, around the mid-1800s significant changes in levels of industrialization and immigration began to lead to discussions about the inefficiency of rural schooling structures. Between 1880 and 1900, as the United States became more diverse and industrialism took hold, state legislators began to prioritize educational organization and efficiency. This shift to a more formal approach to schooling went against the wishes of many leaders in rural communities who did not wish to relinquish control over their communities (Sher, 1977). Unger (2001) noted that the earliest stages of public schooling, the use of the iconic one-room schoolhouse, was most prevalent in the early history of formalized public

education in the United States; rapid socioeconomic changes, however, soon made them obsolete.

As increases in the student population necessitated segregation of students by age groups into grades, the one-room school house began to disappear. With the advent of motorized transportation and the administrative and financial economies of centralized education, the one-room schoolhouse all but disappeared from the American scene, although in the 1990s several dozen still survived in isolated rural communities. (p.769)

Nachtigal (1982) described how between the mid-1800s and 1930s, most schools were small organizations organized by community members and run by one teacher. Although ubiquitous on the landscape, they were quite small both organizationally and structurally. Nachtigal further detailed the expansion in urbanization that our growing country experienced over this period of time and the impacts it had on education:

As late as 1820, only 13 cities of over 8,000 people existed in the twenty-three states that composed the Union. By 1860, the number of cities had increased to 141, marking the beginning of an urbanization trend that continued until the 1970's. With this surge of urbanization, the critical problems for an emerging education system appeared in the cities, and it was here that the shape of American schooling evolved. (p.15)

As cities and urban areas continued to grow, rural communities faced increased pressure to operate in the same way as their larger counterparts. In general, rural leaders tended to resist the pressure to change; thus, the first real wave of school division consolidation was spurred on by forces outside of those rural communities. The drive for uniformity and efficiency of operations continued to resurface. Nachtigal (1982) noted that "One can find few communities that have willingly given up their schools; the pressures for consolidation have almost always

come from the outside by professionals” (p.17). Thus, at this time the prevailing view among those living in urban areas was that these “professionals” leading the charge were more educated and knew more about the future of education than those living in rural areas.

Horace Mann (1796-1859) was another outspoken critic of the structure of the educational system in the United States. Sher (1977) described how Mann viewed the educational system as entirely too decentralized, which resulted in inadequate school support, unqualified teachers, and a range of other educational deficiencies. Prior to Mann’s arrival on the scene, public schooling was not offered to all children; instead, it was only the wealthy who sent their children to private schools. Unger (2001) also stressed that over time, Horace Mann and his “friends of education” were primarily responsible for promulgating the understanding that children could provide more value to their families if they were formally educated and literate. This perspective represented a distinct shift from the commonly held belief that a child could best serve their family through the work they produced on the home front. Alexander and Alexander (2019) underscored the critical role that Mann played in the reform of the education system in the United States:

Public school advocates, led by Horace Mann of Massachusetts, preached an educational awakening that was ultimately to form the basis for state systems of public education as we know them today – free secular public schools supported by both local and state general taxation. (p. 42)

Mann and his fellow advocates believed that formal schooling was a right to which every human being was entitled and that it should not cost them anything to obtain an education. Not surprisingly then, Massachusetts was the first state to mandate compulsory school attendance in 1852 (Alexander & Alexander).

As the movement away from rural schooling without formal supervision grew stronger, a more unified system of education under state supervision was taking hold. While public education is not explicitly enumerated or implied anywhere in the U.S. Constitution, the 10th Amendment of the Bill of Rights, which was ratified in 1791, states the following: “The powers not delegated to the United States, nor prohibited to it by the states, are reserved to the states respectively, or the people” (Pelsue, 2017). This statement makes clear that the history of education in the United States was likely to experience considerable differences in the ways that states structured their school systems.

Although progress towards a more formalized and less regionally bound system of education had been made, there remains a great deal of room for improvement. Ellwood Cubberley (1914) continued the call for educational reform:

Don't underestimate the problem of school reform because the rural school today is in a state of arrested development, burdened by education traditions, lacking in effective supervision, controlled largely by rural people, who, too often, do not realize either their own needs or the possibilities of rural education, and taught by the teachers who, generally speaking, have but little comprehension of the rural-life problem...The task of reorganizing and redirecting rural education is difficult and will necessarily be slow. (p. 105-106)

As the United States entered the 20th century, the country continued to grow and develop as an industrialized nation. Meanwhile, barriers to school division consolidation continued to erode and the movement to centralize rural schools into larger divisions gained momentum. Bastress (2003) noted that as improvements in society in areas such as transportation and economic status began to materialize for many, the movement to consolidate rural schools continued to take root.

Ornstein (1989) stated that in the early 1900s most school divisions outside of urban areas consisted of three to five schools and only a few hundred students. Around that same time, President Theodore Roosevelt initiated what was known as the “Country Life Movement,” which among a variety of social reforms took direct aim at consolidating small country schools (DeYoung & Theobald, 1991). What began as a movement to consolidate rural schools eventually transitioned into a movement to consolidate school divisions as well. In the early 1900s, state officials were hypothesizing that division consolidation could be beneficial in a variety of ways. The Honorable Henry Dewey (1912), State Superintendent of Washington, surmised that division consolidation would result in expanded curricular offerings and more qualified school employees, among other benefits.

Moving into the mid-1900s, Strang (1987) stated that bureaucratic tools originally developed for cities expanded into rural areas. Strang went on to say that “Numerous studies had concluded that consolidation was necessary for modern instruction and efficient administration” (p. 355). In *American High School Today*, James B. Conant (1959) claimed that through the continued consolidation of school divisions and the closing of rural schools, more numerous and various course offerings would lead to improved student outcomes. Accordingly, Conant called for an increase in the number of large schools and for those schools to be centralized. Although the number and size of schools and school divisions in the United States have changed considerably over the last 150 years, the movement towards division consolidation was particularly evident in the mid-to-late 20th century. Nonetheless, it must be stressed that the decision to merge school divisions is often muddled and fraught with controversy. For instance, in referring to a case in Pennsylvania that sought to reduce the number of school districts in that

state, a former state senator, John Wozniak, remarked that “The hardest animal to kill in Pennsylvania is the school mascot” (Finnerty, 2018, para. 2).

Perceived Costs and Benefits of School Division Consolidation

There is no shortage of evidence to weigh on either side of the argument over whether school division consolidation is an effective practice. Table 1 presents a summary the potential benefits and costs on both sides of the decision. While not every element in this table will be explained in-depth, all items listed here are noted in the context of this study. Note, in particular, the use of the word “perceived.” This term is included intentionally to indicate that there are commonly held beliefs both supporting and opposing school division consolidation—and not all of these outcomes will necessarily come to fruition. This point is important because while there may be empirical evidence to support some or all of these claims, they tend to pale in comparison to public perceptions of the issues that impact students and families more directly.

A National Perspective on School Division Consolidation

Across the nation there are a variety of legislative proposals and mandates meant to encourage school division consolidation. The specific laws governing consolidation vary from state to state, leading to significant disparities in the number and size of school divisions across the United States. Although this section is not intended to provide an exhaustive discussion of how division consolidation is stimulated and managed in this country, it will provide insight into the various mechanisms that exist to promote division consolidation.

Table 1. *Perceived Costs and Benefits of School Division Consolidation*

Consolidated Divisions: Perceived Benefits	Consolidated Divisions: Perceived Costs
<ul style="list-style-type: none"> • Creation of economies of scale • Additional curriculum offerings • Greater diversity • Increased specialization of staff members • Lower costs, per-pupil • Funding incentives from the state • Lower administrative costs through the reduction of duplicated positions • Reduced teacher Turnover 	<ul style="list-style-type: none"> • Less Parent/Teacher interaction • Substantial one-time “start-up” costs • Potential for diseconomies of scale if too large • Higher costs related to transportation • Students have less time for instruction and extra-curricular activities due to increased travel to and from school
Non-Consolidated Divisions: Perceived Benefits	Non-Consolidated Divisions: Perceived Costs
<ul style="list-style-type: none"> • Community identity and pride • More personal interaction between the school, teachers and students, families • Schools can be more responsive and adaptive to individual student needs • Less bureaucracy • Reduced transportation time and costs • Greater sense of belonging and connection to the school community • Fewer disciplinary problems 	<ul style="list-style-type: none"> • Higher costs, per-pupil • Reduced expectations for student achievement • Fewer curriculum offerings • Heavier teaching loads • Fewer opportunities for teachers to specialize • Higher teacher turnover • Limited extracurricular offerings

There are a variety of policy incentives driving school division consolidation, which end up disproportionately impacting smaller divisions. Notable among them are the merging of divisions through one-time or long-term financial stimuli, imposing minimum enrollment requirements, or issuing unfunded mandates. Some selected policy mechanisms from around the United States are included in this section to provide some sense of how this process is playing out in specific locales.

Vermont: Preston (2018) described the status of the school division consolidation movement in that state:

In a bid to control costs and help kids at tiny schools access a wider array of educational opportunities, legislators passed a bill in 2015 to encourage school division mergers.

Known as Act 46, the legislation promised financial incentives for divisions that consolidated and intense scrutiny for those that didn't. Controversial from the start – Vermonters are known for what former education commissioner Dave Wolk calls their “cherished penchant” for local control over schools – the act has so far precipitated voters in at least 141 towns to consolidate into 38 new divisions. (pp. 4-5)

In addition to Act 46, the Vermont legislature later proposed Act 49 in 2017 to further mandate the merger of school divisions. This information demonstrates a sustained effort to create economies of scale through whatever means necessary.

New York: A policy brief written by the New York State Association of School Business Officials (2014) indicates that since 1996 alone there were 13 successful (i.e., approved) school division mergers. In contrast, 15 such mergers have been rejected in the state since 2010.

Kentucky: Hyndman et al. (2010) reported that at one time there were over 1,000 school divisions in the state of Kentucky; however, that number has steadily declined to the point that there were only 120 county school systems and 56 independent school divisions in 2010.

West Virginia: Since 1990 West Virginia has closed over 300 schools (The Rural School and Community Trust, 2002). According to the brief, many of the anticipated benefits of these efforts have failed to materialize. In particular, there appears to be little evidence that school closures actually resulted in cost savings. Additionally, the number of children who rode buses more than two hours a day doubled between 1992 and 1996, despite the fact that there was a drop in the number of overall students who used school transportation. A third finding is that while school leadership promised advanced courses, many courses never appeared—or if they

did they were soon eliminated. Furthermore, the report found that some consolidated schools actually offered fewer courses than they did prior to consolidation (The Rural School and Community Trust).

Kansas: Augenblick and Myers (2001) found that at the time they conducted their study, about one percent of American's school-aged children lived in the state of Kansas. Interestingly, however, Kansas could claim more than two percent of the nation's school divisions. This disparity left the door open for some consolidation efforts that have largely failed to make it through the Kansas legislative bodies. Also of note, the authors reported that a school division should have a student enrollment of no fewer than 260 students and no greater than 2,925 students in order to provide a positive school culture, expansive curriculum, and a sufficient number of extracurricular activities.

Minnesota: Haagenson (2015), whose doctoral research included a historical review of school division consolidation in Minnesota, noted a steady decline in the number of divisions in Minnesota. In 1919, there were 8,036 divisions in operation; by 1951, that number had only dropped by 607 to 7,479 divisions. Over the next two decades, however, there was a more precipitous decline such that only 446 divisions remained in 1973. By 2013 that number had continued to steadily decrease with a total of 328 school divisions in operation.

Michigan: Coulson (2010) reported what could be considered to be the optimal level of enrollment necessary to make division consolidation feasible in the state of Michigan. He found that cost savings would only be realized if the following two conditions were met. First, a school division that was "too large" should be broken up into smaller divisions, with the optimal size being 2,900 students. Second, the consolidation of all "tiny" divisions should be conducted when

feasible. Coulson added, however, that geographic and others barriers could make many of these mergers impractical or even impossible.

Arkansas: In 2004, the Arkansas state legislature passed Act 60, which required school divisions to be consolidated if their enrollments were to drop below 350 for two consecutive years. According to Jimerson (2005), “Act 60 has affected 99 divisions – 57 divisions closed and 42 divisions received students from the closed divisions. Twenty-seven of these divisions had a majority African-American student population, or were combined with such a division” (p. 2)

While this snapshot of selected states and their consolidation history is not reflective of the entire nation, it does provide a glimpse into the different conditions of school division consolidation and how consolidation has progressed across the United States. Also worth pointing out is that some state policies empower local voters to make the decision to consolidate, while other locations create committees or hire outside firms to analyze the relevant data prior to reaching a verdict. Another approach involves earmarking certain funds that can only be accessed through the initiation of the division-consolidation process. Thus, while states differ in their formalized approach to school division consolidation—with the process taking place to varying degrees and at different speeds across the nation—it is hard not to notice the overall decline in the number of school divisions in the United States.

Financial Impacts of School Division Consolidation

By and large, cutting operational and instructional costs through the development of economies of scale or size represents the primary driver behind the decision to consolidate divisions. However, the post-consolidation research supporting this viewpoint is essentially non-existent. By merging two divisions into one, proponents maintain that economies of size or scale will be developed. Duncombe and Yinger (2010) stated that “...economies of size exist if

spending on education per pupil declines as the number of pupils goes up, controlling for school division performance. Because consolidation creates larger school divisions, it results in lower cost per pupil whenever economies of size exist” (p. 2). Bowles and Bosworth (2002) conducted research on scale economies in public schools and found that “. . . averaging across school type, an increase of approximately 10 percent in school size decreases cost per student by approximately two percent” (p.47).

In opposition to those who favor the development of economies of scale, McKenzie (1983) studied division consolidation in Australia. The researcher concluded that average per-pupil costs decline up to a point as enrollment increases, reach a minimum, and then rise with further increases in school enrollment size. This report does highlight that while the concept that economies of scale can be realized, it also raises the possibility that after a certain point (depending on the variables in a particular situation) diseconomies of scale may be reached.

Even though supporters of school division consolidation will argue that it represents an effective way to improve division efficiency and cut costs, the research generally does not support this assertion. First, it is important to stress that individual states differ in how they fund their public schools. These different approaches will play a significant role in the division-consolidation process. According to Lunenberg (2010), some states permit their school systems to be fiscally independent entities, which means that they are legally allowed to set the tax rate on real property so long as it falls within constitutional and legislative limits. Other states have school divisions that are reliant on budget appropriations from the state. When fiscally dependent upon the state, the local governing body receives a funding allotment and then decides locally how many of those dollars will be distributed to the school division.

For example, according to Salmon (2010), the funding formulas in place in Virginia, which is considered fiscally dependent, do not create equitable funding streams for Virginia's schools. This disparity in funding can result in massive inefficiencies for the state and local municipalities at large, as indicated in this statement: "Public elementary and secondary education, a vast, uneven, and complex system, is the most significant cost to local government and one of the largest costs to state government in Virginia" (p.1). The formula currently used puts more pressure on localities, and therefore divisions with lower revenue-generating capacity. As Salmon explained, "Since the lower capacity school divisions depend primarily on state aid to fund their budgets, reductions in state aid inevitably result in larger total budget reductions for the lower fiscal capacity school divisions" (p.10). These funding calculations are quite complex and inevitably include variables that will benefit some localities more than others.

Researchers have long disputed the assertion that school consolidation will improve the financial efficiency of a school division or local government operations—and more so when the size of the school division is taken into account. Duncombe and Yinger (2001) expressed marked skepticism about the financial or efficiency benefits of school consolidation, finding little hard evidence to support it.

Over the last 50 years, consolidation has dramatically reduced the number of school divisions in the United States, and state governments still recommend consolidation, especially in rural school divisions, as a way to improve school division efficiency. However, state policies encouraging consolidation are often challenged on the grounds that they do not lead to cost savings and instead foster learning environments that harm student performance. Existing evidence on this topic comes largely from educational cost functions, which indicate that instructional and administrative costs are far lower in a

division with 3,000 pupils than in a division with 100 pupils. However, research on the cost consequences of consolidation itself is virtually nonexistent. (p. 3)

Duncombe and Yinger (2010) also reported that unexpected costs can arise from the transitional expenditures that arise from the consolidation process. These transition costs are covered temporarily in most instances through a policy mechanism designed to provide direct aid (which can even serve to incentivize school division consolidation), but such programs are usually short-lived. Specifically, the researchers argued that an increase in costs most commonly occurs in the first three to five years directly after the consolidation, but in most cases will vanish within ten years.

Similar to how consolidation stimuli and policies differ from state to state, the level and duration of financial support provided for division consolidation can vary greatly between states—and even within divisions depending on certain factors. According to Duncombe and Yinger (2001), the positive financial impacts of consolidation may be more noticeable at the division level, but less so at the state level. They argued that it makes financial sense for smaller divisions to consolidate, but because they are indeed so small those impacts are less likely to be felt all the way at the state level. The authors added that smaller divisions with 1,500 or fewer students stand to gain the most through division consolidation, estimating that the cost savings per-pupil could potentially reach as high as 30% in a best-case scenario (Duncombe & Yinger).

The merger of two school divisions leads to one larger division. Geographically speaking, the newly formed division will cover a larger area than it did prior to consolidation, while also increasing the size of the population that it serves. This situation is even more dramatic when two rural divisions are being combined, resulting in a single, potentially sizable rural area from which students must get to school (Duncombe & Yinger, 2010). Indeed, division consolidation

often results in an increase in the distance that students must travel to school. In a related finding, Kenny (1977) reported that effective schooling inputs are relatively more expensive in rural areas than in urban areas because it costs more to transport students to schools in rural areas than to urban-area schools. This shift impacts not only the school division in the form of increased transportation costs, but also the students who must spend more time on a school bus traveling to and from school, and less time on instruction, homework, and extra-curricular activities. Jimerson (2007) conducted a study of consolidated divisions in West Virginia and found that not only did larger-area divisions lead to increased travel time for students, but also that the students who were disproportionately impacted in this way tended to participate in fewer extra-curricular activities.

From a legal perspective, it has been found that imposing fees for busing students once a division consolidation has taken place are allowed if the division is not willing to fully absorb this cost. In *Kadrmas v. Dickinson County Public Schools* (1988), the Supreme Court of the United States ruled that a reorganized school division could continue to require bus service fees without violating the Fourteenth Amendment. This ruling came about when North Dakota adopted a statute in 1979 that authorized certain school divisions to charge for bus services. Justices Thurgood Marshall and William Brennan dissented, branding the ruling as a retreat from the promise of equal education opportunity. In writing the majority opinion, Justice Sandra Day O'Connor stated that the Kadrmas family failed to show that the North Dakota statute to allow reorganization was either arbitrary or irrational. Further, O'Connor ruled that the Kadrmas family could have chosen to find a private means of transportation to school if they objected to the busing fee.

Streifel et al. (1991) too were unable to identify any sound evidence that financial savings or increased revenue resulted from division consolidation. In their study, Streifel et al. analyzed revenue and expenditure variations in 19 school divisions before and after consolidation. The authors found that there was no statistically significant relationship between the variables chosen to measure whether there was an improvement in financial standing after division consolidation. Indeed, their data indicated that the financial impacts of division consolidation were too variable between differing localities to predict the outcomes with any certainty; instead, they asserted that policymakers would be better served to consider these factors individually at the local level instead of a one-size-fits-all approach from the state (Streifel et al.). The researchers concluded that division consolidation was not fiscally advantageous, regardless of division size. Similarly, Jewell (1989) analyzed available data from all 50 states and found that economies of scale are not guaranteed to develop through the merger of two school divisions. In opposition to consolidation, Jewell also reported that graduation rates tend to be higher in smaller schools and divisions.

Balancing all of these considerations is imperative when deciding what is in the best interests of teachers, students, and administrators in a given school system. Eacott (2019) stated that “We therefore know that school size matters – although there is no perfect size – and has significant implications on how decisions are made and who gets consulted. The overarching tension is in balancing increasing educational opportunity with responsible financial decisions” (p. 682). Without question, improving student achievement and remaining financially solvent are both critical for two divisions considering consolidation; more often than not, however, it is a balancing act for educational stakeholders to keep those two factors in equilibrium. While financial solvency is more easily measured, it can be both challenging and tenuous to adequately

quantify the personal impacts of the consolidation and closure of school divisions on the individuals living in those communities.

Overall, no studies reviewed for this study indicated that costs savings are wholly unattainable through the consolidation of school divisions. The research does demonstrate, however, that when costs savings do materialize, they are typically modest in nature and can be unpredictable depending on the unique characteristics of each school division and the community that it serves. While division consolidation does have the potential to result in minor, often unsustainable savings, it is less obvious what effects the changes brought about through the process will have in the long run on the individuals living in the community—especially in comparison to pre-consolidation circumstances. Therefore, it is essential that policymakers think not only of benefits that they anticipate, but also of the unintended consequences that can result from a decision of this magnitude.

Impacts of School Division Consolidation on School Size and Student Achievement

Conant (1959) was among the first modern-day practitioners to emerge and formally point to the potential benefits of “comprehensive schools,” which eventually led to more frequent consolidation of divisions and schools. The aftereffects of school division consolidation are usually most apparent in increased class and school size, typically coupled with an increase in the student-teacher ratio. Beyond those obvious and easily quantifiable factors, one must also consider other potentially disruptive effects of school division consolidation, such as teacher qualifications and student-achievement data (Beuchert et al., 2018).

An evaluation of the research available on the impacts of school and class size on student achievement reveals a diversity of findings. There is some research to suggest that while there may be some initial disruption to students from the consolidation of divisions and eventually

schools, the overall impact tends to be positive. Nitta et al. (2010) summarized the trend in this way:

We found that in all four consolidated high schools, students, teachers and administrators who moved schools, as well as those who were already at receiving high schools, all believed that consolidation did increase academic opportunities for students primarily through increased course offerings, though they also recognized that consolidation came with larger class sizes and less one-on-one student teacher interaction. (p. 11)

More specifically, Nitta et al. asserted that increasing the size of the school population will allow for the hiring of more teachers, which could potentially increase the breadth of course offerings. Through the implementation of more robust course offerings, students become exposed to a wider range of topics. In addition, school consolidation can lead to students being exposed to a variety of social interactions, student diversity, and settings. Dolph (2008) stated that when student interact with a more extensive and diverse community, they become more informed and socially aware. Similarly, Smith and DeYoung (1988) asserted that because small schools are likely to draw from a limited geographic area, they are less likely to expose students to diverse peers and viewpoints. The authors argued that interacting with a smaller variety of teachers could also have a limiting effect on the growth of students. Finally, they claimed that the smaller enrollment at the school would hinder social development and reduce the number of social groups available for students.

On the flip side, there are also studies to suggest that increased school and class sizes have few positive impacts on student achievement. For instance, Howley (1994) found that when other factors were considered to be in parity (notably community or individual socioeconomic status), a comparison of divisions and individual schools according to enrollment-size

differences tended to favor smaller schools. Berry (2006) noted that small schools are able to benefit students in ways that large schools simply cannot match, "...having fewer students in each school should create a more nurturing environment where all kids can receive the attention they need – and none fall through the cracks that may develop at a larger school" (p. 1).

Glass and Smith (1979) conducted a meta-analysis of the research available at the time of their study pertaining to the correlation between class size and student achievement, concluding that there was a strong relationship between the two factors. Glass and Smith summarized their findings by stating, "There is little doubt that, other things equal, more is learned in smaller classes" (p. 15). Hattie (2017), who is well-known for his research on the various impacts of a range of factors on student achievement, reported that reducing class size had only had a marginal impact; specifically, he measured the effect size of 0.21 which falls into his defined range as likely to have a positive impact on student achievement, albeit a small one. This level is relatively minor compared to other factors that Hattie measured, as his study indicated that 0.4 represented a "hinge point" above which something has a significant impact. Hattie argued that reducing class size alone is ineffective if teaching practices go unchanged. It is important to stress that Hattie did identify a level of correlation between class size and student achievement—but it was not as impactful as some other influences.

Another aspect of school division consolidation and student achievement that should be noted is that it may lead to the construction of new school buildings or the renovation of existing structures to meet the needs of a growing population. Research shows that the improved condition of school buildings can have positive impacts on learning outcomes. Earthman et al. (1996) found that there is a positive relationship between student achievement and student behavior and building condition.

Effects of School Division Consolidation and School Closure on Community Identity and Relationships

Because every community, state, and school division will feature distinct idiosyncrasies, consolidation is not a process for which a “one size fits all” approach can be applied. A community, regardless of location, will have its own social structures that can have immediate impacts on how the consolidation of schools is to be perceived and interpreted by the members of each community. Given the impact that these decisions can have on a community, it follows that soliciting input and feedback from the community should be considered as a best practice. While there are a range of other factors at play beyond public perception in the decision to consolidate, governing bodies must listen to feedback from those within the impacted district to increase buy-in and acceptance. The extent to which this process can be considered to be both transparent and objective, however, is questionable. As reported by Gladson (2016),

Most school divisions and municipalities have recognized that community input is important and necessary for this type of a decision, and most divisions have formally requested public commentary in writing or through public hearings (or both) at some point in the school closure process. But it is debatable whether the public’s comments are genuinely considered by local decision makers. Even though community input should be highly persuasive, many affected communities – especially those that have dealt with year after year of closures – have reported that, from their perspective, school divisions have already made a final decision by the time public input is requested. (p.35)

In a similar vein, Alsbury and Shaw (2005) argued that “In the shadow of government incentive, a blurring of political and economic factors may leave obvious economic benefits on the surface, while obscuring the political purpose served for one community as the result of

another's declining status" (p. 114). This statement summarizes the idea that there are many reasons why a merger between schools or divisions may make sense, but it may also be politically motivated. Moreover, that motivation can often be disguised in such a way that the community as a whole is unable to perceive the true reasoning behind the decision.

As noted earlier, school consolidation can lead to increased time spent on the school bus traveling to and from school, which could impact time spent working on homework or participating in extracurricular activities such as school sports or clubs. More significant is the fact that consolidation or school closing may be a signal that the community as a whole is already undergoing some negative changes. Notably, schools are at risk of consolidation or closing when their enrollment has dropped to a point that is no longer sustainable from a cost perspective. Gladson (2016) found that "closing neighborhood schools disrupts and further destabilizes communities that are already burdened with other forms of instability" (Gladson, 2016).

When a school closes there can be immeasurable impacts on the morale and pride in the community that was once associated with that school. Community members who may once have felt like they had a voice in their local school's decision-making processes may now feel disenfranchised. This fear is valid given that division lines must be re-drawn when a school closes. As such, certain community members are challenged to establish new relationships with unfamiliar school board members, teachers, counselors, and other educational stakeholders who are positioned to impact the ability of their child to thrive academically.

Effects of Federal, State, and Local Policy on School Division Consolidation

There are a number of policy-related considerations to take into account when seeking to analyze and understand the decision to consolidate school divisions. Most of these considerations

are state-specific as the level of U.S. federal oversight over the consolidation of school divisions is quite limited. This lack of federal guidance should come as no surprise since educational policies and practices have long been a function of the state; thus, state policymakers are tasked with determining their own best practices. Inevitably, this more localized approach to consolidation has also led to large differences between states and even within states.

While there are many ways to determine the effectiveness of a policy, Hannaway and Woodroffe (2003) summarized it succinctly, as follows: “The ultimate test of any policy tool in education is the extent to which it improves the effectiveness and efficiency of schooling in the United States” (p.1). There are also many factors that come into play when policies are designed and implemented. Earthman (2019) noted the inherent strain that exists between empirical evidence and political and philosophical influences. It is important to point out that this is not only a modern-day problem; indeed, “This has been the case in the field of education since the inception of this country” (Earthman, p. 239).

As outlined earlier in this chapter, the lack of consistency in implementing and rolling out consolidation policies and procedures harkens back to the somewhat fractured history of educational reform in the United States. In many states, the decision is driven primarily by policies that create financial incentives intended to induce school division consolidation—not all of which achieve their intended outcomes over the long term. While these financial incentives are often implemented at the state level, they are felt more profoundly on the local level. The way that some of these incentives are created might give the impression that they were designed by states to maintain control and centralize command over local governments. Strang (1987) spoke about this impact when stating that “Such centralization is limited – it does not affect the distribution of authority between the federal, state, and local levels. But from the perspective of a

student, parent, school, or neighborhood, organizational authority is clearly more distant and more centralized” (p. 383).

Howley et al. (2011) argued against statewide policies on division consolidation in favor of allowing those decisions to be made at the local level. The authors pointed out that there are unique circumstances, socio-economic and demographic factors that blanket policies fail to fully consider. Alsbury and Shaw (2005) expanded this concept further by stating:

On the one hand, school consolidation may provide students in small communities a more diverse “acquaintance group” offering a possible increase in social justice. Conversely, the closing of a community’s school and subsequent demise of the community and its unique values may diminish a national values pool, this diminishing diverse cultures and lessening the goals of social justice. (pp. 107-108)

One argument against the consolidation of divisions and the eventual closing of schools is the impact that such decisions can have on those who are coming from lower-income urban or rural areas. The research shows that school consolidation and closures can have greater unintended consequences for students in low-income and racially diverse areas compared to students from wealthier suburbs. Diem and Welton (2020) argued that, “Thus far, in all cases nationwide the decision to close schools has disproportionately not been in the best interests of low-income, students of color and families” (p. 63).

Stockdale (1992) wrote about the law that Minnesota legislators passed in 1990 that had an indirect but intentional impact on the increased likelihood that small and less fiscally stable school divisions might be forced to consolidate. Specifically, Minnesota legislators made changes to state fire-inspection laws, which although well-intentioned had a detrimental effect on funding for small school divisions. As Stockdale reported, the updated law changed the criteria

necessary for school divisions to qualify for capital loans by linking the loan approval to the average number of students enrolled in each grade level across the division. If enrollment numbers dropped beneath that threshold, those divisions would be unable to receive the capital loans, thusly reducing their fiscal capacity to update their school buildings and eventually leading to failed fire safety inspections. At the time of inspection, either the Fire Marshal or the State Commissioner of Education had the power to condemn a building as unsafe, ultimately forcing consolidation upon the division and community. This convoluted narrative highlights the circuitous ways that legislators can sometimes find to affect change through indirect measures.

To help ensure that consolidation reforms are more equitable and achieve their intended outcomes, educational stakeholders could consider implementing more targeted policy tools. Such a process requires greater coordination between local and state officials to identify policies that can positively impact individual communities, as opposed to blanket policies mandated by the state that may not “fit” in the same way between localities. For instance, Duncombe and Yinger (2010) called for financial aid provided through division consolidation to be targeted and prolonged. They described the challenge of funding short-term, more immediate needs within a school division, while also planning for the longer term based on limited resources. Additionally, Duncombe and Yinger stressed the importance of creating more targeted guidelines for aid programs such that financial assistance to divisions transitioning through a merger or consolidation should consider the distinctive circumstances and characteristics of each community.

School divisions are incredibly complex organizations that play a key role in every local community in the nation. Much of that complexity is derived from the unique social and economic structures that exist in each community. It is completely unrealistic, therefore, to

believe that even the most well-structured school consolidation policy will work for each and every community in the same way due to the differences between them. Therefore, more attention and effort should be directed towards the development of policy tools that take these variances into account.

School Division Consolidation in Virginia

The consolidation of school divisions in Virginia is quite rare, having occurred only three times within the last 38 years: (a) Alleghany County and Clifton Forge in 1983, (b) Halifax County and South Boston in 1995, and (c) Bedford County and Bedford City in 2013. Each of these cases are detailed in the following subsections. Two of the school division consolidations in Virginia have resulted through the process of a city reverting to a town; thus, it is important to first understand the process by which a city becomes a town. Troutman and Sanders (2019) addressed the potential benefits for the county when a city achieves town status. First, the researchers pointed out that changing a city to town status is the opposite of annexation in that land and population are added to the county, rather than removed. As such, revenues that used to go to the city are directed to the county, including (a) state payments for salaries and expenses for constitutional officers, such as sheriffs; (b) property taxes (though towns can impose their own property taxes, in addition to the county taxes); (c) the local share of sales taxes; (d) court fines and forfeitures, and (e) federal, state, and local school operational funds and school cafeteria funds.

It is worth noting that regardless of the list of potentially fiscally advantageous factors listed above, it is unlikely that any city would choose to revert to a town if it were financially solvent. Summerlin (2002) outlined the expected increase in fiscal responsibility for the newly expanded county when he stated, “The principal disadvantage of reversion from the county’s

perspective is a shifting of service responsibilities to the county, resulting in increased fiscal stress. Expenditures for public education constitute the majority of any local government's budget" (p. 19).

Alleghany County and Clifton Forge – 1983

With the goal of achieving greater fiscal efficiency, the local governing bodies and school boards for Alleghany County and Clifton Forge agreed to consolidate their school divisions. Some years after the merger, Litts Burton (1989) described the rationale for the decision: "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" (p. 123). While there were some initial naysayers, the merger was effective. Some 18 years later, the City of Clifton Forge reverted to a town in 2001, which further impacted Alleghany County. Litts Burton stressed that the "benefits of the merger have continued to manifest the foresightedness of those who led the way to the merger of the schools" (p. 142). Linkenhoker (1993) also studied the consolidation of the school systems in Clifton Forge and Alleghany County, concluding that it had been a beneficial decision:

Localism still prevails and the Alleghany Highlands school division must make decisions which will maintain the delicate partnership that exists between Alleghany County and Clifton Forge. To date, the arrangement has been extremely successful and students in the system have been the beneficiaries. (p. 286)

It is worth noting that this case is the only instance of school division consolidation in Virginia in which a decision to consolidate two divisions was agreed upon prior to the reversion of a city to a town. The following two described consolidations resulted from the merger of two municipalities and not as a precursor, as was the case in Alleghany County and Clifton Forge.

Halifax County and South Boston – 1995

When Halifax County and the City of South Boston (an independent entity as of the 1990 U.S. Census) were unable to come to a mutual agreement on the best path forward toward possibly uniting, the Commission on Local Government (1992) was created to assess the situation. Earlier in 1990, South Boston had indicated that it wanted to revert to town status; Halifax County, however, resisted those efforts to the extent to which they were able to do so. At the time the report was issued, which included a fiscal stress analysis of South Boston, the city was considered to be experiencing “above average stress” (p. 7). In this case, the merger of the two school systems took a backseat to larger economic considerations. The Commission on Local Government report states: “While the resolution of the issues regarding the possible merger of the two school divisions and the integration of educational services of the two jurisdictions is of considerable significance, the disposition of these issues would not alter our findings” (p. 39).

When Ted Daniel, Town Manager for South Boston was interviewed in 2011 (News and Advance) he stated the following: “There are pros and cons, but at the end of the day South Boston couldn’t go on the way that it was as a city. Something had to give.” For the most part, local residents considered the reversion of South Boston to a town within Halifax County a prudent decision. Nonetheless, it is not necessarily surprising that a governing authority formed to analyze the entirety of this process would essentially resort to saying that the merger of schools was an afterthought in their process. Also of note is the fact that the largest cost savings brought about through the town reversion process was realized through bringing the water and sewer systems under a single authority (News and Advance, 2011).

Bedford County and Bedford City – 2013

In 2013, the City of Bedford reverted to town status, thereby setting in motion a merger of the two school systems: Bedford County and Bedford City. In this instance, this was not particularly disruptive because previously Bedford City had been paying Bedford County to provide educational services to its residents (Report on City of Bedford, 2012). Although the consolidation ultimately benefited Bedford County, the locality did have to absorb significant debts. Notably, Bedford Elementary School was badly in need of repair; in fact, at the time of the city's reversion to town status, this school was worth only 29.4% of its estimated value (Report on City of Bedford, 2012).

Bedford County did, however, receive a significant financial boon through the consolidation process thanks to the ability to maintain the LCI previously assigned to Bedford City. This process is outlined explicitly in Governor Northam's Budget Bill (2020):

In the case of the consolidation of Bedford County and Bedford City school divisions, the fifteen-year period for the application of a new composite shall apply beginning with the fiscal year that starts on July 1, 2013. The composite index established by the Board of Education shall equal the lowest composite index that was in effect prior to July 1, 2013, of any individual localities involved in such consolidation, and this index shall remain in effect for a period of fifteen years, unless a lower composite index is calculated for the combined division through the process for computing an index as set forth above. (p. 137)

Ongoing and Potential Future School Division Consolidation

In 2013, Virginia legislators assigned the Joint Legislative Audit and Review Commission (JLARC) to study school division consolidation; their report, which was issued in

2014, revealed two primary findings. The first was that while government and school consolidations tend to decrease costs to localities, those mergers do not necessarily indicate an improvement in the quality of services provided. The second finding of note was that local identity is a significant barrier to the consolidation process. As discussed in the JLARC study, the dissolution of a school division can represent a significant blow to community, which can sometimes lead to a sense that local identity is being sacrificed for the greater good.

Currently, there are two areas where town reversion and/or school division consolidation are being considered. One is in Alleghany County where government officials have recently voted to merge their school division with that of Covington City. This particular case study is the topic of this dissertation. In a feasibility study conducted by Regimbal Jr. and Salmon (2019), the authors noted that Alleghany County has lost 27% of its student enrollment since 2013; in contrast, Covington City has increased its membership by 14% over the same period. In an effort to improve their combined efficiency, the governing boards of the two localities voted in September 2020 to follow the recommendations of the feasibility study and voted to consolidate their school divisions (Roanoke Times, 2020).

Additionally, in January 2020 the City Council in Martinsville voted to begin the process of reversion (Taylor & Baylor, 2020). If the process is completed, the result will enable the consolidation of the school systems in Martinsville City and Henry County. In preparation for this process—and specifically how it will impact the school systems—the City of Martinsville commissioned a feasibility study which was conducted by S. John Davis and Associates, Ltd., the intent of which was to “present findings that will enable policymakers to make an informed decision regarding the potential consolidation of the two school divisions” (p. 1).

Summary

The consolidation or merging of school divisions is something that can and does impact people on a personal level. As such, it is imperative to analyze this somewhat rare phenomenon from a structural and individual perspective. There are few documented studies that focus on the history of school division consolidation in the state of Virginia from a human perspective. Nor is there an abundance of available research or literature surrounding the personal impact that these decisions can have on students, teachers, and community members. While there is a wide array of information arguing both for and against school consolidation—particularly from a financial standpoint—the subject of how communities or the individual members of those communities are impacted by school division consolidation is underreported. In other words, the metrics associated with consolidation, which are more easily measured, receive a great deal more attention than the personal impacts, which cannot be obtained or quantified through the use of a spreadsheet or the interpretation of numerical data.

In Virginia, the 2014 JLARC study referenced previously in this literature review echoes the concept that school division consolidation and the processes through which they can occur are topics that are both timely and of local importance. The primary focus of the JLARC study was government consolidation, which is significant since there are currently localities in Virginia where enrollments are declining and locally derived tax revenues are being reduced. Many of the references in this paper have echoed the findings of the JLARC study: that even if the decision to consolidate two school divisions makes sense financially, the desire to maintain local identity often impedes any efforts to consolidate.

The fact remains that there are a variety of impacts that school division consolidation can have on stakeholders at all levels. Adams Jr. and Foster (2002) summarized these various impacts concisely when they made the following statement:

Assume nothing and analyze much when considering consolidation proposals. Purported benefits of larger organizational units do not materialize automatically. Context is important, and issues of efficiency, cost, student performance, educational climate, and community relations must be addressed. (p. 838)

These sorts of multifaceted decisions about school division consolidation too often fail to take into account the impacts that these changes can have on individuals and communities; instead, proponents of consolidation rely too heavily on the promise of improved financial prospects that may never materialize. There are many variables than cannot be measured from afar, and impacts that cannot be fully quantified without being a member of a specific community and living through such an experience.

Based on literature findings and events currently unfolding, this study was designed to analyze the consolidation efforts that are now occurring between Alleghany County and Covington City Public Schools. Each of the topics and themes discussed in this chapter relate in some way to the ongoing process in the Alleghany Highlands. Given that school division consolidation is considerably rare in Virginia, this approved consolidation provides a timely and relevant topic worthy of analysis. There may be additional opportunities for divisions to consolidate in Virginia; as such, the findings from this study could serve as a point of reference for those and others.

CHAPTER THREE: METHODOLOGY

Research Design

The primary method utilized in this study was a naturalistic research design in the form of a narrative case study. Creswell (2018) explained:

Case study research is defined as a qualitative approach in which the investigator explores a real-life contemporary bounded system (a case) or multiple bounded systems (cases) over time, through detailed, in-depth data collection involving multiple sources of information (e.g., observations, interviews, audiovisual material, and documents and reports) and reports a case description and case themes. The unit of analysis in the case study might be multiple case (a multisite study) or a single case (a within-site study). (p. 217)

Creswell (2018) also stated that case study researchers typically investigate current, real-life cases that are in progress so that they can generate accurate information not negatively impacted with the passage of time and memory. Given that the decision to consolidate the school divisions of Alleghany County and Covington City was made just months before this study was conducted, the process by which this was to occur fits these important criteria for a case study. Additionally, the analysis of available archival material related to this process could support a more thorough understanding of school district consolidation in a way that could be relevant and beneficial to other educational stakeholders considering undergoing similar changes.

Yin (2014) explained that case study research involves the study of a case within a real-life contemporary context or setting, which often involves analyzing a community, a relationship, a decision process, or a larger process in its entirety. This study's data emerged from interviews with key actors who had been involved directly in the decision to consolidate

these two school divisions. It was believed that the first-hand information obtained from personal interviews, combined with historical materials such as school board meeting minutes, and joint resolutions, would be critical in creating a broader picture of not only the decisions leading up to this consolidation, but also the ripple effects caused by the consolidation.

Given that only three school division consolidations have occurred in the Commonwealth of Virginia in almost four decades, it is expected that a record of the events that led up to the decision to consolidate these two school divisions could be useful to other school divisions considering a similar move. Indeed, a detailed roadmap of the factors that led these two entities to decide to consolidate, augmented by first-hand accounts of the process, are expected to enhance our understanding of (a) why the merger was approved this time as opposed to the numerous times this merger had been studied and considered previously without moving forward, and (b) the specific factors or conditions influencing its approval. Interviews were employed to gain an understanding of the specific factors and conditions and how they had evolved over time.

As noted previously, the consolidation of school divisions is a rare occurrence in Virginia. As such, it was believed that recent data associated with certain legislative pressures to enact this merger—primarily resulting from the 2014 JLARC study—would be useful in understanding this process more fully. Hopefully, the findings from this case study will assist in filling a void in available research on the topic of school division consolidation in Virginia, as well as potentially serving as a blueprint guiding future decisions by other school divisions.

Document Review

This study was designed to answer three questions: (RQ1) What factors led to the decision to consolidate the school divisions of Alleghany County and Covington City? (RQ2)

Since this was not the first time that school division consolidation was proposed in the Allegheny Highlands region, what factors were different or why were the factors weighed differently this time? and (RQ3) What role did funding made available by the General Assembly play in this decision?

To answer the first question a thorough review of newspaper articles, school board meeting minutes, and other similar documentation was undertaken. Additionally, an analysis of printed material, coupled with an assessment of prior events and demographic trends that ultimately led to this decision was helpful in understanding the historical foundation upon which the study was based. The second and third questions were best answered via the discussions that took place during the interview process, which also served to clarify why this consolidation was approved and will be fully implemented in mid-2022.

While this case study relied primarily on interviews with key actors, the analysis of archival and historical materials was essential. These materials included school board meeting minutes, school board and governing body resolutions, and Joint School Services Committee meeting minutes, and other historical artifacts. Also of importance to this study is the work conducted by Mary Litts Burton, whose 1989 study laid the foundation for this case study and will be referred to throughout this study.

Participant Selection

Miles et al. (2014) described the participant selection process as purposive rather than random. The authors stated that participant sampling in qualitative studies is often not fully prespecified but can and should evolve once fieldwork begins. This study relied on the information uncovered during interviews with participants to inform the selection of additional

participants. Due to the small size of the Alleghany Highlands community, it is likely that even if participants request anonymity, this may not be possible.

Several factors went into designing a study that could adequately capture the perspectives of potential interviewees. First, Institutional Review Board (IRB) approval was obtained. The IRB process focused on how the researcher would protect the collected data, including the personally identifiable information of each interview subject. Another aspect of the IRB process involved adhering to all COVID-19 research protocols. Interviews took place during the summer and fall of 2021 while the COVID-19 pandemic was still a significant concern; thus, the pandemic impacted the willingness of many to meet in person for discussions. As such, information about options to engage with interview subjects (i.e., in person or remotely) had to be included in the protocol submitted to the IRB. The protocol stated that all identified interview subjects would be offered the option of participating in the interview in-person, over the phone, or via Zoom. On June 14, 2021, the IRB issued an approval letter, in the form of an exemption, based on the information provided, allowing the research to begin (see Appendix A). After approval had been received, the first interview was scheduled for the following week, with interviews continuing until October 2021.

Data collection for this study relied on interviews with key actors identified through the process of examining documents that the Joint School Services Committee submitted to the Virginia Board of Education. The identified participants played a vital role or had the ultimate authority to put the consolidation in motion by serving on the Committee tasked with studying the proposal and eventually making the recommendation to consolidate the two school divisions. These participants included local and state politicians, educators, businesspeople, citizens, and school board members. Current and former school superintendents from Alleghany and

Covington were also interviewed. Additionally, Delegate Terry Austin and Senator Creigh Deeds (both sitting elected officials in the General Assembly who introduced legislation for the funding provided) were both contacted for interviews. Delegate Austin was responsive and agreed to meet. Regrettably, an interview with Senator Deeds could not be scheduled. As the study evolved and additional key actors were identified, other school system employees were also interviewed.

During the interviews, the promise of anonymity was extended to each interview subject, which was expected would elicit more meaningful and direct responses. Interview subjects were informed that their names would appear in the published study, but they would not be attached directly to any responses. This assurance encouraged individuals to respond freely to the questions posed, although some individuals still offered to allow their names to be attached to their statements. In the interest of both consistency and remaining true to the approval granted by the IRB, direct quotes are not used herein, and all responses are reported anonymously. However, due to the small size of the Allegheny Highlands community, it is likely that even if participants requested anonymity, this might not be achievable.

To report the answers while honoring the anonymity of the interview subjects, the interviewees were arranged into two composite groups depending on their roles. The first group comprised "current or former school employees," and the second group included "elected and or appointed officials and community members." Within the second group, it is essential to recall that both the Allegheny County and the Covington City school boards are appointed and not elected. Conversely, the Covington City Council and the Allegheny Board of Supervisors are elected. The formation of composite groups was intended to protect the privacy of respondents,

while also grouping those individuals who served in a similar role and therefore may have had similar perspectives.

Table 2 provides a list of respondents in each of the two composite groups. The current and former school employees list includes individuals who were deeply involved in the "what happens next" phase of the consolidation process. The interviewed former school employees provided a good deal of context around the "how did the Allegheny Highlands get here" question and theme. Ultimately, the list of elected and/or appointed officials and community members provided a more comprehensive view of how the consolidation came about. Many of those individuals were ultimately responsible for the consolidation process altogether, including its approval.

Table 2. *Respondents Who Took Part in This Study by Name and Role*

Group I: Current and Former School Employees	
Sherman Callahan	Former Interim Superintendent in Allegheny County
Mark Pace	Former Superintendent in Allegheny County
Sarah Campbell	Former Superintendent in Allegheny County
Marty Loughlin	Former Superintendent in Allegheny County
Bob Grimesey	Former Superintendent in Allegheny County
Gene Kotulka	Former Superintendent in Allegheny County
Kim Halterman	Former Superintendent in Allegheny County
Keven Rice	Current Director of Finance in Allegheny County
Melinda Snead-Johnson	Current Superintendent in Covington City
Group II: Elected and/or Appointed Officials and Community Members	
Jonathan Arrit	Covington School Board Chairman
Jacob Wright	Allegheny School Board Chairman
Mary Fant-Donnan	Executive Director of the Allegheny Foundation
Terry Austin	Current House of Delegates Member for District 19 (includes the Allegheny Highlands)
Tom Sibold	Current Mayor of Covington City

Data Collection Procedures

In addition to evaluating available archival material, one-on-one interviews were conducted, both in person and by telephone or Zoom. No individual was interviewed more than once. The researcher developed the instrument used for data collection. The questions posed to respondents were divided into four broad categories: (a) politics and leadership (e.g., Why do you think that it has taken so long for this consolidation to happen?); (b) facilities (e.g., What is the planned use for the middle school sites); (c) community (e.g., Were community members given enough of a voice in this process?); and (d) financial considerations (e.g., At what point was the decision made to request lump-sum funding from the General Assembly?). The full list of questions can be found in Appendix F.

Questions from this list were selected depending on the individual being interviewed and their role before, during, or after the consolidation approval. Additionally, due to the various roles of the individuals being interviewed, questions were modified slightly based on the interviewee's level of involvement and expertise. It should be noted that the questions were primarily the same for both groups with one primary exception: the questions for school employees (current or former) tended to be more logistical, while the questions for the elected or appointed officials tended to focus more on high-level, policy-level questions. Throughout all interviews, the one common thread was the opening question that served as the "foundational" question, regardless of the composite group to which the subject belonged. After reviewing the interview procedures with every respondent, each interview began with the following question:

As you are aware, Allegheny County and Covington City have reached an agreement that will create a consolidated school system in July 2022. After multiple feasibility studies and 40-50 years of discussions about this topic, some formal and some informal, in your

opinion, what was different this time around? How did the Alleghany Highlands end up here?

This opening question was intentionally open-ended and allowed the respondent to go in any direction they wanted with their response. This approach helped the researcher to determine what series of follow-up questions made the most sense based on their answer to the initial question, including the role that they played before, during, or after the consolidation was approved.

One of the unfortunate constraints of this case study is the fact that it studied a process that was still ongoing at the time of data collection. For that reason, there had to be a cutoff date after which point no additional information would be gathered or reported. That date was October 20, 2021, which is when the newly formed school division's colors were announced to the public. That is also the date that the final interview took place and therefore represented a natural stopping point for data collection. As discussed in greater detail in Chapter Five, future researchers will be able to begin to analyze how the actual consolidation process played out after October 20, 2021—starting in July 2022 with the merging of Central Office staff between the two divisions and culminating in August 2023 when the newly combined schools first open their doors.

Data were compiled by the researcher for the purpose of supporting the findings of this study. Each participant was given the option of speaking on-the-record or off-the-record. All interviews were recorded and transcribed verbatim. The interviews were analyzed after completion; any quotes obtained during the review of documents from public meetings or school board meetings are attributed directly to each individual in the reported findings section of this study.

Research Questions

Three questions guided this study:

RQ1: What factors led to the decision to consolidate the school divisions of Alleghany County and Covington City?

RQ2. Since this is not the first time that school division consolidation has been proposed in the Alleghany Highlands region, what factors were different or why were the factors weighed differently this time?

RQ3. What role did funding made available by the General Assembly play in this decision?

Timeline for Research

An analysis of historical artifacts and matters of the public record began in June 2021. At the conclusion of the prospectus defense in May 2021, the consent to conduct research was obtained from the Institutional Review Board at Virginia Tech in June 2021. Interviews and other supplemental data collection began in June 2021 and continued through October 2021. A final dissertation defense including reported findings and conclusions is expected to be completed on February 3, 2022.

Summary

To summarize the methodological approach used in this qualitative study, a case study was determined to be the most appropriate research method to analyze the consolidation process between Alleghany County Public Schools and Covington City Public Schools. This situation is unique in that it is recent and still ongoing. Creswell (2018) concluded that case study research is best when a single case is selected to illustrate the issue of interest, which is the case for this study.

There are historical factors that have played a role in the decision to consolidate the school divisions in Alleghany County and Covington City, and it was essential to understand each of those influences. Accordingly, both archival and interview data were evaluated for this study. Both the analysis of data collected during interviews with key actors, and the examination of archival materials, were essential components in determining how these two communities reached this point. This study is expected to provide a foundation that can be analyzed retrospectively once the consolidation process is complete and the newly formed school division has begun operating and can be further examined.

CHAPTER FOUR: RESULTS

Introduction

This study was designed to identify the historical foundations, regional and community influences, processes, and comprehensive assessments that led educational stakeholders in Alleghany County and Covington City to decide to consolidate their school divisions. Since school division consolidation has been considered numerous times previously for this region, it is also critical to understand what was different this time that led to the successful effort.

Three research questions guided this study:

1. What factors led to the decision to consolidate the school divisions of Alleghany County and Covington City?
2. Since this is not the first time school division consolidation has been proposed in the Alleghany Highlands region, what factors were different, or why were the factors weighed differently this time?
3. What role did funding made available by the General Assembly play in this decision?

The personal perspectives surrounding the impacts of this decision to consolidate were found to be essential for responding these questions. For that reason, semi-structured interviews with key actors were used as the primary method for data collection since this approach is appropriate for obtaining targeted, yet potentially rich data (Bryman, 2008; Dörnyei, 2007). Interview data provided essential information for understanding the importance of this school division consolidation and its impacts on the community and the region. Supporting documentation such as meeting minutes and resolutions provided context for the personal

narratives. However, the first-hand evidence collected during interviews with those identified as key actors served as the most significant component of the collected data.

The results of the interviews are reported in this chapter from the perspectives of the two composite groups. The first group was comprised of current and/or former school employees; including former superintendents, finance directors and current superintendents. The second group of interview subjects consisted of current elected or appointed officials from Allegheny County or Covington City including city council members, school board members, and other knowledgeable community members. A complete list of those individuals can be found in Table 2.

The summarized responses of the two groups are reported separately. As the interviewing process evolved, it became evident that there were substantive differences in the responses of the two groups and those differences appeared to be due, in part, to the differing roles that each group played in the process. The current elected and appointed officials were more heavily involved in the planning stages and the procedural steps of the division consolidation. In contrast, the current school employees were less engaged during the early planning stages, but at the time of the interviews were deeply enmeshed in the work of making sure the consolidation would be carried out as planned. Former school employees were interviewed to provide a critical perspective surrounding the status of previous consolidation efforts in the Allegheny Highlands.

Fundamentally, this study was intended to answer the questions of "what has happened" and "why now." The development of a case study approach and the subsequent personal interactions during interviews have led to the formation of the results. When appropriate, direct quotes are used to add depth to the findings.

Review of Prior Research on the Alleghany Highlands

A review of antecedents to the merger decision provides a context and foundational understanding of the school systems and the community and region. As discussed in Chapter 2, two prominent pieces of research provide vital background on the school systems in the Alleghany Highlands: the study conducted by Litts Burton (1989) and Linkenhoker (1993). While both studies were previously discussed, a brief synopsis of each has been provided here to clarify and contextualize the findings detailed later in this chapter. The Litts Burton study, in particular, remains highly relevant in the defined geographical context.

The study conducted by Litts Burton (1989) provides a highly relevant contextual foundation for understanding the recent division consolidation efforts. As a measure of its importance, all Joint School Services Committee members were given a copy of her study as a point of reference. In particular, the study served as an important artifact and resource as the committee determined a reasonable timeline for implementation.

Furthermore, the Litts Burton (1989) study was referred to in the final resolution that the Joint School Services Committee provided to the Virginia Board of Education while seeking their approval. Specifically, the resolution highlighted that her study made mention of the possible inclusion of Covington City Schools during the 1983 merger between Alleghany County and Clifton Forge. In her research, Litts Burton spoke of “the opportunity that consolidation would give Covington students to have a great school system” (p.33). Of additional importance is Litts Burton's mention of "the foresightedness of local leaders" (p. 137), which is another theme that is a common refrain in the interviews reported in this study.

A few years later, Linkenhoker (1993) examined the history of schooling in the Alleghany Highlands region, which encompasses Alleghany County, the Town of Clifton Forge,

and Covington City. His research is also relevant to the present study in that it often refers to the prevailing sense of localism that many residents hold on to so tightly. This concept is still prevalent in the Alleghany Highlands today. The Litts Burton (1989) and Linkenhoker (1993) reports provided an excellent foundation upon which this current research was developed. Quite presciently, Linkenhoker alluded to the likely relevance of his report in stating,

The study of the past can provide a clear perspective for the present and help create a vision for the future. Those who know where they have been should have a better idea of where they are going. It is hoped that this study will add to the continued growth and development of the schools in Alleghany County, Clifton Forge, and Covington. (p. 290)

Recent Timeline of School Division Consolidation in Alleghany County & Covington City

Appendix A presents a timeline of events leading to the consolidation of Alleghany County and Covington City schools and provides a longer-term context for the current study. Although this timeline is vital to developing a sense of how events unfolded that ultimately led to the decision to consolidate the two school divisions, it is likely helpful to include a more detailed and recent understanding of events as well.

While not expressly stated, interviews with key actors revealed that informal discussions about forming a committee to study the concept of school division consolidation between Alleghany County Public Schools and Covington City Public Schools began in 2018. Then, in 2019, the Joint School Services Committee (JSSC) was formed, which consisted of members of both school boards and members of the Covington City Council and the Alleghany County Board of Supervisors. In alphabetical order, the committee members included Jonathan Arritt (Covington City School Board), Gerald Franson (Alleghany County School Board), Matt Garten (Alleghany County Board of Supervisors), James Griffith (Alleghany County Board of

Supervisors), Erika Hunter (Covington City School Board), Tom Sibold (Covington City Council), Allan Tucker (Covington City Council), and Jacob Wright (Allegheny County School Board). Also present were both division superintendents, although they were not voting members of the committee.

The initial organizational meeting was held on August 22, 2019. Jacob Wright, the Chairman of the Allegheny County School Board, was elected Chairman of the JSSC (Joint School Services Committee, 2019). At this meeting it was announced that the General Assembly had appropriated \$400,000 in funding for the committee to function and perform its intended function of studying the feasibility of school division consolidation between Covington City and Allegheny County.

Mr. Wright explained that all expenses related to this study will be taken from the \$400,000 in funding that the General Assembly has granted to the area to explore this project. The money came from a budget amendment drafted by Delegate Terry Austin last year and is specifically earmarked for the Allegheny Highlands to find an efficient way to run its school systems. Mr. Wright also emphasized the responsible use of this funding and noted that any money left over once the project is complete will be used for Jackson River Technical Center, which is a joint venture between the two school systems. Committee members voted to identify Allegheny County Public Schools as the fiscal agent responsible for oversight of those funds. (p. 4)

At the JSSC meeting on September 26, 2019 (JSSC, 2019, p.3), it was determined that the committee should have a Mission Statement, and approved the following:

The Committee on Joint School Services will examine all relevant quantitative and qualitative data available in consideration of consolidating Allegheny County and

Covington City Public Schools in accordance with § 22.1-25 of the Code of Virginia. The goal of this effort will be the maintenance of and continued pursuit of excellence in instruction and educational opportunities for the students of the Alleghany Highlands while maintaining the fiscal responsibility the citizens of our community expect and deserve. (p. 4)

Over the next several months, various matters were discussed during committee meetings, including an analysis of the timeline and process described by Mary Litts Burton in her 1989 study. It is also important to note that the JSSC retained the services of the Troutman Sanders Law Firm from Richmond, Virginia to provide assistance on procedural steps and governance issues. Stephen Piegrass, was the lead attorney assigned to the assist.

Through discussion, the JSSC also determined that the most challenging aspect of a potential merger would be equalizing salaries between the two school divisions. To that end, the JSSC voted to request the expert services of James Regimbal and Richard Salmon to conduct a study on salary equalization, while also analyzing the considerable financial impact that could be expected if the two school divisions were merged. The feasibility study was presented at a JSSC meeting on December 19, 2019 (JSSC, 2019, p.2). Regimbal and Salmon reported to the committee that efficiencies were to be gained from operating a consolidated school division and concluded that the evidence supported moving forward with the process.

At a JSSC meeting on January 16, 2020 (JSSC, 2020, p.3), it was decided that independent subcommittees should be formed. Each subcommittee would consist of a member from the JSSC, plus other school division employees from both Covington City and Alleghany County. Ultimately, five subcommittees were formed that would undertake a thorough analysis of finance, transportation, curriculum, facilities, and governance.

Due to the emergence of the COVID-19 pandemic, the JSSC did not meet again formally until April 30, 2020. The committee set future meeting dates and decided that meetings should be conducted via Zoom until further notice in the interest of committee members' well-being. The JSSC and subcommittees met several times during the Summer of 2020, culminating with a public forum on August 27, 2020, at Curfman Hall in Covington. This hearing was the final step in the process before the JSSC approved the consolidation plan, and a vote would be taken on the proposal by the local governing bodies.

On September 9, 2020, the governing bodies in Alleghany County voted on the consolidation plan as presented by the JSSC. The Alleghany Board of Supervisors approved the proposal with a vote of 6-1. The Alleghany County School Board approved the plan with a vote of 4-1. On September 10, 2020, the governing bodies in Covington City voted on the proposed consolidation plan. The Covington School Board approved the plan by a 3-2 vote. The Covington City Council also approved the plan by a vote of 3-2.

On October 23, 2020, the Committee on Joint School Services submitted the Joint Proposal for the Consolidation of Alleghany County and Covington City School Divisions to the Virginia Board of Education. The proposal was presented for the first review to the Board of Education on November 19, 2020. On January 28, 2021, the Virginia Board of Education unanimously approved the formation of a consolidated school division between Alleghany County and Covington City Public Schools. The approved resolution stated that the new division would officially be formed, and administrative staff between the two divisions would be combined on July 1, 2022. The student bodies will be merged at the secondary level (grades 6-8 and 9-12) at the start of the 2023-2024 school year.

On March 2, 2021, the General Assembly announced a four-year commitment to fund local educational needs tied to consolidation efforts. The first-year (2022-2023) amount from the Commonwealth will total \$1,200,000, with an additional \$600,000 annually for three years. According to the Allegheny Journal (2021), this structured allocation of funding will go towards implementing an "Early Retirement Incentive Plan" (ERIP), salary equalization for employees upfront, and other related anticipated costs.

Several other issues were resolved during the meetings of the JSSC meetings. First, in an effort to capture the regional importance of the consolidated district, the newly formed division would be known as Allegheny Highlands Public Schools (JSSC, 2021, p. 2). However, the existing secondary school names (Allegheny High School and Covington Middle School) would be retained, with both schools using the Cougar mascot. Representing a prescient decision to engage student buy-in, the JSSC decided to deploy a poll allowing current students in grades 4-12 to vote on the color scheme for the new division (JSSC, 2021, p.4). Subsequently at a recent JSSC meeting on October 20, 2021 (p. 3), it was announced that the newly formed division would use the colors of Columbia Blue and Navy Blue, which the committee announced was the overwhelming favorite among students who voted.

The Reporting of Results

Data collected from the semi-structured interviews conducted between June and October of 2021 are reported in this section. The responses were synthesized using a researcher-developed system intended to capture factors, beliefs, or viewpoints that most individuals (more than 50% of the group) reported, some individuals (more than one, but fewer than half of the group) reported, or that a single individual reported. These groupings allowed the interview responses to be categorized into three levels of importance: (a) responses reported by most

individuals and therefore determined to be critical or most important to an understanding of the topic (Level 1 statements); (b) statements made by multiple individuals (but not most) that were also identified as significant to the body of research (Level 2 statements); and (c) comments made only once, but still perceived to be noteworthy by the researcher and therefore worthy of inclusion in this section (Level 3 statements).

Current and Former School Employees: Level One Findings

A common theme among respondents was the perceived financial trouble that Covington City was experiencing. Almost all respondents included this factor as part of their reasoning for why Covington would agree to move forward with school division consolidation after resisting efforts for such a long period. Another commonality was the influence of elected and/or appointed officials being a significant aspect of the timing for the consolidation. Specifically, the ability of Jacob Wright, Jonathan Arritt, and Tom Sibold to work together was noted by multiple individuals to have been essential to school division consolidation. Having the right people in the right place at the right time was a prevalent theme in nearly every interview.

Respondents agreed that when the student bodies merge, it is more likely that the adults (community members, teachers, and staff) would have more difficulty with the transition than the students. Many respondents referred to the positive way students behaved after the Alleghany – Clifton Forge merger during the 1980s. This commonly held belief among the respondents in this study mirrors the earlier findings of Litts Burton (1989). Importantly, interviewees identified trust and open lines of communication as commonly shared values that featured prominently in this consolidation process, but which may not have been present in previous efforts. In particular, respondents linked these values to the strong relationship between Jacob Wright and Jonathan Arritt that ultimately permeated other members of their respective

communities. In fact, nearly every respondent spoke to the importance of the existing relationships in the community among officials as something that played a critical role in getting this done.

It should be noted that Covington City and Alleghany County currently work together to provide many shared services, including fire and EMS, sheriff/police protection, social services, and others. Additionally, Covington supplies most of the water for Alleghany County residents. Respondents identified these shared services as areas where the two localities were already working together; therefore, unifying the school districts was spoken of as being a natural extension of those established linkages. The idea that a combined school division will mean that no efforts are being duplicated within a small geographic region was identified as a vital component of the process. In a related way, the idea of a newly formed school division not having to compete with another school division right next door for resources was recognized by multiple respondents as a positive outcome of this effort. Several individuals noted that the continual dwindling of the regional population would only intensify this competition for local resources. Indeed, many respondents believed that school consolidation had reached the point at which it was all but unavoidable due to strained regional finances and declining population.

The introduction of more regionally focused ideas and branding over the past decade was mentioned as playing a significant role in this process. Respondents reported that this shared identity led stakeholders to focus more on the similarities between school divisions rather than the differences between them. Several respondents identified The Alleghany Foundation, a local charity focused on improving community and regional outcomes, as primarily responsible for this trend and their development of a shared "sense of place" for the Alleghany Highlands. All respondents agreed that the inclusion and continued use of the current Covington High School

facility and property represented a non-negotiable provision to encourage Covington to move forward. This proviso was specifically mentioned as something different in this current effort that had not always been promised in previous efforts.

The intentions of those leading the consolidation efforts to remain positive throughout the process were mentioned as playing a vital role. Again, respondents agreed that the focus, effort, and positive leadership of Jacob Wright and Jonathan Arritt were indispensable to this effort proceeding as quickly and efficiently as it did.

On the flip side, the current and former school employees who took part in this study agreed overwhelmingly that two factors were responsible for the failure of prior consolidation efforts: a tenacious sense of community pride and local identity, and an unwillingness to relinquish their independence. Interestingly, a commonly held belief among respondents is that Allegheny County had been open to this effort for decades, but that Covington City remained resistant based on the factors listed above. In the end, however, the reality of tenuous financial resources that could be further impacted by out-migration from the region, coupled with a range of shared services already provided to residents of both locations, caused respondents to agree that the consolidation of schools was in a sense inevitable.

Current and Former School Employees: Level Two Findings

Multiple individuals predicted the reversion of Covington City to town status, stating that agreeing to consolidate the two school systems has always been the biggest hurdle to governmental reversion. However, with that “now out of the way,” several respondents were certain that governmental consolidation would soon follow. Several respondents reported that this consolidation would not have occurred had it not been for Jacob Wright, who lived in the

area and thus was mindful of the possible spinoff effects. Being trusted locally appeared to be critical to his ability to be persuasive and see this process through to the finish line.

A number of respondents singled out the \$400,000 provided by the General Assembly as being essential to the process. With that money coming from the state government in Richmond, it safeguarded local funds from having to support the consolidation. For those who mentioned this support, they were of the opinion that legislators in Richmond must have thought the process had merit if they were willing to invest that much in the region.

Some school employees were more pragmatic in their views. Although optimistic, several respondents spoke about the time-consuming and challenging work that lies ahead for school division officials. As one individual stated, "now the real work begins." Focusing on the importance of extracurricular activities, several respondents predicted that creating a winning high school football program would lead to the community coming around to the idea more quickly.

Delegate Terry Austin was identified as someone who played a vital role in this process but was not perceived as being pushy or having a preferred outcome. Instead, several respondents stressed that multiple individuals supported the effort and played an essential role in the funding that was ultimately approved—but only after support had been secured at the local level.

In summary, for some current and former school employees, the promise and approval of funding from The General Assembly played an essential role in the consolidation of Covington City and Alleghany County schools. Without that financial assurance at the outset of the process, many respondents reported that discussions would have stalled and, as one school employee put it, "The horses would have been stuck at the starting gate."

Current and Former School Employees: Level Three Findings

One individual pointed out that both Allegheny County and Covington City Public Schools accepted non-resident students without tuition, which this person equated with both divisions needing all the extra funding they could get. "This is not about education – it is not the primary focus of this" was stated by one individual who believed this was the first step towards governmental reversion. This individual was concerned that the consolidation of schools would inevitably lead to Covington reverting to a Town and the two governments being consolidated into one.

One individual noted the proactive rather than reactive approach taken during this process as being an important aspect. That person asserted that prior efforts focused too much on what could go wrong if division consolidation did not occur—and less on what the region would stand to gain from consolidation. One respondent stressed the importance of open and frequent communication during the planning and transition phase, adding that transparency would lead to greater trust within the community and ultimately to more buy-in from faculty and staff members.

On a negative note, one interviewee described the consolidation process as "rushed" and "fast-tracked." Although they indicated that they were not questioning the overall concept of the consolidation, they felt it had come together too quickly. They were afraid that important considerations might have been overlooked, including community acceptance. Another respondent described the discontinued use of Clifton Middle School as a K-12 facility as "a travesty." That person went on to say that they were thankful that the local community college would be allowed to use it, but that it had only been built in the last 15 years and was one of the best, if not the best K-12 facility in the region.

However, another respondent was realistic about the inevitability of the consolidation: “This is a future-oriented decision. We have a shrinking tax base, a stagnant population, and too many people on a fixed income. The governing bodies realized that this had to happen.” Similarly, another individual spoke to the fact that this consolidation made good financial sense and would lead to more significant academic outcomes for students. As they concluded, the consolidation of schools in the Allegheny Highlands “is 100% in the best interest of students.” This person cited the Litts Burton (1989) study as justification for this assertion. Another respondent involved in previous consolidation efforts spoke to the importance of Covington “being allowed to have a school board representation that exceeds their per-capita representation” as a critical component of this effort. “That was just the tip of the spear” is how one individual classified the Clifton Forge – Allegheny merger in the 1980s, implying that the eventual merger between Covington and Allegheny was inevitable.

In summary, this section illustrates that while the data collected were mostly positive and optimistic about the consolidation process, not all respondents felt that way. There remain individuals among those interviewed who felt that this process was carried out hastily. It must be stressed, however, that this opinion was a minority view.

Elected and/or Appointed Officials and Community Members: Level One Findings

Numerous interviewees among the elected and/or appointed officials and community members who contributed to this study described how both Covington and Allegheny began to appoint people to their school boards who were open to the concept of consolidation, some of whom helped to set the wheels in motion. Most people reported that this openness had always existed in Allegheny County, but more recently Covington has become open-minded to the concept, which had not necessarily been the case in earlier instances. Many people highlighted

the trust between all governing bodies as an integral role in this process. The developed relationships led to the "breaking down of walls," as one individual described it.

Many interviewees pointed out the significance of the Covington High School facility and property being included in the proposal. Most noted that Covington High School (which will become Covington Middle School) is the most centrally located school facility in Allegheny County. One individual said that "the inclusion of Covington High School helped them feel like they were a part of this."

The emergence of new leadership in the region, namely Jacob Wright and Jonathan Arritt, was identified as playing a pivotal role by many people. These individuals were described as "progressive," "proactive," and "unwilling to sit idly by while the region crumbles." Various individuals identified the perseverance and focused vision of Jacob Wright as being a critical component of the consolidation being approved. Some added that he never allowed the process to lose momentum, even in the face of the COVID-19 pandemic. Many individuals spoke to the importance of people with a shared vision being involved in the process; moreover, those involved were described as being cordial, open-minded, and willing to work together. Among those identified as having this shared goal were Jacob Wright, Jonathan Arritt, Terry Austin, and Tom Sibold.

About the collective influence of individuals, several people highlighted recent efforts in the community to identify themselves as one region to dispel the fear that tribalism would impede the process. Similarly, existing joint services between Allegheny County and Covington City were identified as something that helped move the discussion about consolidation forward. One person opined, "These people (community members) already do almost everything together. Why should going to school be any different?" That holistic view of the community was

mentioned in many interviews as something that opened people up to the idea of operating a shared school division.

Another commonly shared perspective was that the merger was likely to promote increased educational efficiency and the capability to offer more opportunities to students. Additionally, “people being aware of the financial standing of this region” was a common theme reported multiple times. Several individuals noted that the General Assembly was very interested in "creating a new model" for school division consolidation in Virginia. Legislators were very aware that Bedford County and Bedford City had taken advantage of the previous model in charting their new path. Multiple respondents reported the importance of timing and one cited the involvement of “the right people in the right places at the right time.”

Like the other respondent cohort, this group overwhelmingly cited the transparency of the proceedings at the committee level and the willingness to share information with the community as an essential component of the current effort that had not been a part of previous efforts. Indeed, this different, intentional, and well-defined approach represents a theme that came up multiple times during interviews. Finally, several respondents identified the willingness of the JSSC to offer three seats to Covington on the new school board and the inclusion of a super-majority for certain types of votes as crucial elements of the agreement coming together.

To summarize, a pervasive theme among this group of respondents was the identification of Jacob Wright and Jonathan Arrit as essential to the movement to consolidate the two school districts. Indeed, regardless of the composite group and the findings reported for each, their role in advancing the process was seen to be essential.

Elected and/or Appointed Officials and Community Members: Level Two Findings

From a historical perspective, a few respondents identified the research conducted by Litts Burton (1989) as pivotal to understanding the history of previous consolidation efforts, adding that it helped them understand the timing and sequencing of the formal process. Moreover, the fact that this effort was only about schools and not governmental consolidation—as some prior efforts focused on—was considered to be something that helped the process move forward. Some individuals also commented on the willingness of Covington's leaders to "set their pride aside in the greater interest of their community" as an important component. It should be noted, however, that several individuals did point out that while school consolidation represented an important step, that governmental consolidation would now stand a better chance of success due to these efforts.

Some respondents spoke to the importance of understanding the "pulse" of the community if community leaders are to make the best decision for the region. These individuals also acknowledged that although these decisions can be unpopular at the time, if people understand that leaders have their best interests at heart, they may be more willing to accept them with time.

Multiple individuals stated that finding a way to complete the process without having to fire employees was essential. Those individuals credited this understanding to the feasibility study conducted by Regimbal and Salmon. Additionally, receiving the approval of funding from the General Assembly to align salaries and incentivize retirement were identified as key components. Increased opportunities for students with minimal disruptions to class size were also identified as key considerations.

In summary, this level-two group of elected and/or appointed officials and community members stressed the importance of maintaining the community identity in the new school and division names as necessary for building community support. They also singled out the Litts Burton (1989) study as helping them understand the history of prior consolidation efforts, which added to their support of the current consolidation.

Elected and/or Appointed Officials and Community Members: Level Three Findings

One individual identified both current and prior efforts of The Allegheny Foundation in highlighting the efficiencies that could be gained through regional partnerships as something that helped promote greater willingness to accept school division consolidation. A single respondent alluded to prior studies on school division consolidation, which the JSSC used in their analysis process, to state that school division consolidation does not make sense in every situation. Nonetheless, this respondent added that the JSSC had sufficiently made the case for how it would benefit the Allegheny Highlands. Similarly, another interviewee highlighted the importance of the JLARC study conducted in 2013, which stressed Virginia's efforts to have future school division consolidation efforts focus on what makes sense for each locality instead of a one-size-fits-all approach. Referring to efforts to obtain funding from the General Assembly, "aiming high" with the appropriations requests was how one person described that process. That individual went on to say that "they told us we could come back for more, if necessary, down the road."

In discussing the unwillingness of people to shed their "high school identity," one respondent said that many people never leave the Allegheny Highlands—making it the only identity that they know. When asked why a referendum was not offered to the voters in the region, one individual responded that "it did not fit the timeline." Addressing why this process

felt different this time around, one individual who had been part of past division consolidation efforts highlighted that this committee was smaller and more manageable and therefore able to move more efficiently through the process. One individual stated, "We currently have two good school systems. Our goal was to create one even better school system." Another individual stated that it was important that this work was done at the local level first and foremost before any elected officials in Richmond became involved. Finally, when asked about the number of people who spoke in opposition to the proposal at the public hearing that was held in Covington in 2020, one person replied, "I think the fact that none of the votes by the governing bodies were unanimous is an indication that those opposing voices were heard and expressed by those elected or appointed to represent them."

In summary, a clear theme among this group of responses was the importance of transparency throughout the process. Even those respondents who were not in favor of the decision to consolidate noted that this process was more open than previous efforts. The willingness to keep the general public abreast of changes and where the process stood was important in garnering support among community members.

Conclusion

In analyzing the interview data obtained from the interview questions designed to understand the historical and regional influences, processes, and assessments that led educational stakeholders in Allegheny County and Covington City deciding to consolidate their school divisions, a number of themes emerged. The results of the interviews are reported in this chapter from the perspectives of the two composite groups: (a) current and/or former school employees (e.g., former and current superintendents and finance directors), and (b) current elected or appointed officials and community members from either Allegheny or Covington (e.g., council

members and school board members). The findings are also documented in three levels from most-cited to least-cited.

Among the prevalent themes that emerged from the qualitative data are the importance of trust and open lines of communication from the inception of the process, the good working relationships of those driving the process, community buy-in, and taking into account the regional identity and pulse of the community in decision-making. Also found to be important were illustrating how the consolidation would benefit students in increased course offerings. The implications of these findings will be discussed in Chapter Five.

CHAPTER FIVE: DISCUSSION

Introduction

This study emerged from the researcher's interest in determining and more fully understanding the process by which the decision was made to consolidate the school divisions in Alleghany County and Covington City. To reiterate, consolidation refers to combining two school districts into a single entity, which is typically prompted by the need for schools to operate more economically and efficiently. Based on literature findings and events currently unfolding, this study was designed to analyze the consolidation efforts that are now occurring between Alleghany County and Covington City Public Schools. Following that analysis, interviews were conducted with key actors from Alleghany County and Covington City. Each of the topics and themes discussed in this chapter relate in some way to the ongoing process in the Alleghany Highlands, which is located in the far western edge of the state and comprises a total area of about 450 square miles. Given the relative rarity of school consolidation in the United States and Virginia—in part because such mergers often lack political traction—this approved consolidation provides a timely and relevant topic worthy of analysis. Moreover, there may be additional opportunities for divisions to consolidate in Virginia as demographic factors continue to change; as such, the findings from this study could serve as a point of reference for other educational stakeholders considering such a broad-reaching decision.

Three broad research questions directed the design of this study:

RQ1: What factors led to the decision to consolidate the school divisions of Alleghany County and Covington City?

RQ2: Since this is not the first time that school division consolidation has been proposed in the Alleghany Highlands region, what factors were different, or why were the factors weighed differently this time?

RQ3: What role did funding made available by the General Assembly play in this decision?

At the outset of each interview an introductory paragraph was read to each interview subjects.

As you are aware, Alleghany County and Covington City have reached an agreement that will create a consolidated school system in July 2022. After multiple feasibility studies and 40-50 years of discussions about this topic, some formal and some informal, in your opinion what was different this time around? How did the Alleghany Highlands end up here?

From there, applicable questions for each key actor were selected from the pool of questions listed in Appendix G based upon their level of involvement and/or role.

The interview questions developed for data collection were categorized according to four overarching themes: (a) politics and leadership, (b) facilities, (c) community-related concerns and issues, and (d) financial considerations. Appendix G provides a list of the specific research questions according to topical area and research question to be addressed.

Findings and Conclusions from the Research

For over 40 years the possible merger of Alleghany County and Covington City Public Schools has been studied and debated. Evidence of this was found in newspaper reports, the Linkenhoker and Litts Burton studies, and school board and committee meeting minutes. The interviews of key actors were designed to parse out why the decision was made to consolidate

these two school divisions at this time. Chapter 5 presents a discussion of the findings that emerged from the interview data. As discussed in Chapter 3, the research and data collection involved two stages. The first stage consisted of the review of historical documents and artifacts including school board meeting minutes, news articles, and committee meeting minutes. The interpretation of this data was critical in forming the interview questions which made up the second phase of data collection. The first phase of data collection led to the development of significant and necessary interview questions.

The answers to each of the research questions necessitated a synthesis of the responses from interview subjects, supplemented by a review of documents. While some of these questions were asked directly during interviews, most questions required blending different elements of each. Therefore, the responses that were provided by key actors needed to be analyzed closely in order to form a response to each of this study's foundational research questions.

Discussion of Research Question One

The first question sought to determine the factors leading to the decision to consolidate the school divisions of Allegheny County and Covington City. Importantly, the responses associated with this question varied greatly depending on several factors—but mainly based on familiarity with the issues and process. For instance, some of the key actors that were interviewed had been in the Allegheny Highlands community over the many iterations of consolidation proposals, dating back to the 1980s. For those who witnessed this conversation evolve over time, responses tended to be more developed and significantly more nuanced in terms of detail. Others who had not resided in the community for as long may have evidenced strong opinions on the different factors, but they tended to be less in-depth in their responses. As

detailed in the following sections, three key themes emerged from an analysis of the qualitative data associated with RQ1: timing, building consensus, and political/community will.

Timing. One of the key themes revealed by the data is that timing played an enormous role in this process. The changes in leadership at both the school and governance level occurred at such a time to significantly enhance the likelihood for a successful effort. Based on the responses of key actors, it seems reasonable to conclude that if Jonathan Arritt had not been elected to the Covington City School Board in 2018, the consolidation of schools would not have occurred. While Jacob Wright played the role of the “point guard” and was a great consensus builder, without Jonathan Arritt to bridge the gap between the two localities, most respondents believe this effort would not have succeeded.

Building consensus. A synthesis of the data confirmed that building consensus among governing bodies proved to be a critical ingredient for success. As the interview responses revealed, Jacob Wright had the foresight to put this topic on the table at the right time. However, had he not done the work to build relationships with other key stakeholders in the community in the years leading up to this effort, it seems likely that the push for consolidation would have failed yet again. The ability of individuals to cross locality lines and work together for the betterment of the community at large cannot be overemphasized. As Covington City Mayor Tom Sibold pointed out when this process was unfolding, “Our populations have dropped significantly over the last 50 years. . . We’re half the size we used to be. Schools cost more and more. Are we giving the children the best education we can give them as we are now? Those are the things we need to be thinking about” (Adams, 2020, para. 21).

Additionally, one of the reasons that the consolidation was able to occur this time was the insistence on open lines of communication and transparency in the process. As several

individuals noted during interviews, prior consolidation efforts were not transparent; instead, prior efforts to consolidate took place behind closed doors and tended to remain shadowy and poorly understood, which only served to undermine consensus-building efforts.

Political and community will. Ultimately, the one motivation that seemingly tied all decision-makers together was the willingness to do what they believed would be in the best interests of the youth of Allegheny County and Covington City. This common goal, identified early on by the Joint School Services Committee, remained a bedrock throughout the entire duration of the deliberation process. This factor not only led to enhanced decision-making, but also made the movement more easily defensible to those who were opposed to the effort as had been the case in past attempts. The intentional and continual focus on doing what was best for the children of this region represents a key factor that eventually led to this effort succeeding.

Discussion of Research Question Two

The second question sought to determine the factors leading to the decision to consolidate the school divisions of Allegheny County and Covington City. Recall that this was not the first time that school division consolidation had been proposed in the Allegheny Highlands region. Thus, RQ2 was designed to identify the specific factors that were either different, or were assessed differently this time. As detailed in the following sections, two key themes emerged from an analysis of the qualitative data associated with RQ2: a willingness to work together, and the involvement of The General Assembly and the Virginia Department of Education.

The willingness to work together. Interview data associated with the second research question indicated that unlike prior consolidation efforts, the key actors in this process were far more willing to work together in seeing this process through to a successful conclusion. Moreover, it appears that this willingness stemmed from the ability of the leaders involved to be

open-minded to the concept of change, to weigh decisions more dispassionately, and to look ahead to the future of the region and how consolidation efforts would impact that future. As several key actors indicated, the decision-making process in the past tended to be driven by more emotional, knee-jerk responses. For instance, it was noted that in many instances Covington representatives rejected consolidation efforts—not because they did not believe it was the right thing to do and would benefit the region—but primarily because they did not want to give up their identity and influence. Moreover, former leaders in the Covington community were of the belief that if they gave up their schools, their community would cease to exist. Mayor Tom Sibold, among others, had the foresight to understand that sanctioning a joint schooling effort with Alleghany County would be a reasonable extension of the many of the other public services that the two localities already shared. Thus, the ability of leaders to shift a formerly narrow perspective of community pride and identity be willing to work together toward a larger vision was essential to the decision to combine school divisions.

The involvement of The General Assembly and the Virginia Department of Education. Data from both respondent groups (current and/or former school employees and elected and/or appointed officials and community members) stressed the significant role that The General Assembly and the Virginia Department of Education played in ensuring the success of consolidation efforts. Notably, their willingness to provide an attractive financial package to incentivize this effort—which was not a factor in the past—was critical. For all prior school division consolidation efforts in Virginia, the incentive offered was the use of the lower local composite index (LCI) to the newly formed division. In Alleghany County and Covington, however, this incentive would have been essentially meaningless because their LCI ratings were nearly identical. Additionally, the use of the LCI incentive would not have given the JSSC the

ability to announce early on that no jobs would be lost in this consolidation, as some respondents stressed. Indeed, some respondents pointed out that prior efforts could not, or did not, promise job security, which led to more (though not all) school system employees being in support of the current efforts to consolidate the two divisions. The foresightedness of all leaders involved at both the local and state levels to see that this unique situation required a creative partnership with specific financial incentives cannot be overstated. Indeed, unlike prior consolidation efforts, the willingness and desire for the General Assembly to create a new pathway for school division consolidation helped to lead to a different outcome than in previous efforts.

Discussion of Research Question Three

The third research question sought to determine the role that funding made available by the General Assembly played in the decision to consolidate divisions. As detailed in this section, financial incentives played a huge role in sanctioning the consolidation process. In this instance, stakeholders were tasked to design a creative financial incentive that made sense for the entire Allegheny Highlands region, while also benefitting both Covington City and Allegheny County. As discussed, the 2015 JLARC study had previously called for the use of direct payments if school division consolidation in the Commonwealth of Virginia were to occur again. While at one time the use of the lower LCI for an agreed-upon number of years made sense, this perspective changed very quickly after the Bedford City-Bedford County merger in 2013. Based on lessons learned from that most recent consolidation, stakeholders in The General Assembly and the Virginia Department of Education seemed to concur that they had just as much to gain from a newly designed financial incentive package as did the local governing bodies in Allegheny County and Covington City. This mutually beneficial financial arrangement added to the momentum that this effort had already gained at the local level. Specifically, leaders in

Richmond were able to work with local leaders in devising a strategy to ensure that no positions would be lost and that no school facilities would have to be closed in order to combine the school divisions. This widely promulgated aspect not only led to a greater level of support among citizens, but also allowed elected and appointed officials to be more openly supportive of an effort that their constituents now had fewer reasons to oppose.

Limitations of the Study

There are several limitations associated with this study that must be noted in that they impact the generalizability of findings. As detailed herein, this qualitative case study was designed to describe the process by which the decision was made to consolidate the school divisions in Alleghany County and Covington City. Based on the methodological design of this investigation, five potential limitations must be noted: the timing of this investigation, the willingness of respondents to speak openly, the nature of the respondent sample, the data-collection instrument used for this investigation, and researcher bias.

The Timing of this Investigation

The approval for the consolidation of Covington City and Alleghany County schools occurred in January 2021, with the process well underway at the time this dissertation was being written. However, the present study will be completed and published several months prior to the July 2022 combining of central offices, and over a year before the student bodies are merged at the secondary levels. While this study was focused on understanding how and why this consolidation was approved—including identifying the specific factors that were different this time around—not being able to see the entire process play out in terms of efficacy could be considered a limitation of this study.

Willingness of Respondents to Speak Openly

To reiterate, semi-structured interviews were used for data collection, which involves the use of series of predetermined questions. This type of interview format helps to keep the interview focused on a specific topic, while also enabling some flexibility in responses (Bryman, 2008; Dörnyei, 2007). Despite assurances of respondent anonymity, some key actors familiar with this subject seemed to be unwilling to speak their minds with full candor. Some respondents seemed to pause and consider what they were about to say or were guarded in their responses, while others appeared willing to share all the knowledge they had of the process, as well as their personal viewpoints. Some of these differences were observed across the composite groups. For instance, some (but not all) of those who remained actively engaged in the process and/or were local to the region appear to be less willing to speak their minds. In contrast, others who either left the Alleghany Highlands or were no longer actively employed within the two school districts spoke more freely and seemed more willing to provide candid, detailed responses. Other possible limitations are that the respondents who took part in this study could have intentionally misreported information (e.g., provided information that they thought the researcher might want to hear), failed to respond truthfully to all interview questions, or unintentionally faulty information due to misremembering the events or having a limited knowledge of the topic (Kormos & Gifford, 2014).

Respondent Sample

Purposive sampling was used to identify participants for this study, since a cohort of people familiar with this particular consolidation process were needed. Although several groups of individuals were considered for possible inclusion as respondents—notably students, teachers, and community members—they were ultimately left out of the study. Thus, it is possible that

these excluded groups could have added some helpful context to the study. Ultimately, these groups were excluded due to concerns with sampling size and a preference for focusing on how and why this decision was reached. Once the study became more focused on the process and the relevant factors driving it, it made less sense to include these groups.

Researcher Bias

The researcher for this study was conscious of any personal bias about the consolidation process now underway between Alleghany and Covington City schools, and the inherent complexity of the decision to undertake such a potentially momentous change. Nonetheless, the researcher sought to ensure that objectivity and impartiality were considered throughout the research process to maintain the integrity of the study.

Implications for the Alleghany Highlands

In addition to adding to the scholarly literature on the history of school consolidations, the findings of this investigation are significant in what they imply about the future of the Alleghany Highlands region. This section will attempt to define the perceived implications. First, there has been a clear effort among leaders in the region to focus on commonalities between the different communities within the region. This focus on a single regional identity, as opposed to multiple smaller identities, has been a major focus of the Alleghany Foundation, which as described in Chapter Four is a local charity focused on improving community and regional outcomes, and developing of a shared "sense of place" for the Alleghany Highlands. While the Alleghany Foundation did not have any direct impact on the process of school division consolidation, the data indicate that their efforts to educate the local citizenry about the benefits of taking a more global view of the consolidation efforts appeared to result in a greater openness to moving the discussion forward. During many of the interviews, respondents indicated directly

or indirectly that even though there were two distinct school systems in question, they are made up of individuals who have much in common. The students from both schools play travel sports together and spend time at many of the same social events. The adults in the community shop and dine in many of the same places and work together. It was the ability of local leaders to highlight these commonalities that facilitated this consolidation effort gaining momentum and ultimately succeeding. Therefore, it is anticipated that a continued focus on shared values, activities, and goals will serve this community well in the decades ahead.

The decision to consolidate school divisions has serious implications for the future financial health of the region. Going back to some of the research presented in Chapter Two of this study, it is likely that combining two divisions into one will help to create efficiencies that would not otherwise exist. These efficiencies will provide a greater financial security to a region that continues to see their population decline at an alarming rate. Consider the following projection:

Alleghany County has seen a 16% and Covington a 22% decline in population from 1990, according to the U.S. Census Bureau. Future projections don't look any rosier: The Weldon Cooper Center for Public Service projects that Alleghany County's population will decline an additional 20% by 2040, and Covington will drop by 15%. (Adams, 2020, para. 7)

By combining efforts to educate their youth, the region will be better positioned to withstand those changes in population should they continue well into the future. A reduction in the duplication of educational efforts in an area as small as the Alleghany Highlands is sure to be a net positive. In the opinion of this researcher, the leaders involved in this effort had the foresight to anticipate these changes and act earlier rather than later.

One possible future implication that is not currently a concern is the potential for redistricting between school attendance zones. One positive aspect of this situation is that because enrollment levels are below capacity limits at all current secondary schools, there is no need to build new structures or add space to existing structures. Although this cost saving is a distinctly advantageous feature of this particular school division consolidation, this is not always the case. In some instances when two school divisions are merged, it is necessary to build new, larger school structures in order to accommodate the newly formed division.

Nonetheless—and given that the outcome of these consolidation efforts is still unknown—it is possible that after some time the division will need to consider re-drawing attendance zones in order to maximize efficiency of school bus routes and minimize the associated costs. These factors should be studied, and their findings announced far enough in advance to minimize any sudden shocks to the student, parents, and school community.

Recommendations for Future Research

The results of this study helped to identify several themes that represent worthy topics for future research. First and foremost, it would be useful to produce a study similar to the one that Mary Litts Burton published in 1989. As mentioned in the Limitations section of this chapter, due to the timing of this investigation it was impossible to “look back” at a fully enacted consolidation effort between Covington City Schools and Alleghany County in the same way that Litts Burton was able to do. Toward that end, and using this study as a starting point, it could be meaningful to allow some time to pass prior to formulating a follow-on study to understand the full effects that the consolidation of these two school divisions ultimately had on students, teachers, and educational stakeholders in the Alleghany Highlands.

Additionally, since this is the first time that this new financial incentive package was implemented, it would be helpful to understand the short-, medium-, and long-term effects of this decision. It could also be beneficial to compare and contrast previous consolidation efforts with the current effort with a focus on the differences in the financial incentives that were utilized.

Another topic for future research could focus on the personal perspectives and experiences of individuals with first-hand knowledge of a voluntary consolidation such as this one. At the time this dissertation was finalized, there were only two available case studies that could be considered. The first, of course, is the current consolidation effort in Allegheny County and Covington City where the merger occurred voluntarily and with the agreement of all governing bodies. The other case study, which was begun in 2020, involves the Martinsville City reverting from a city to a town, with Henry County being forced to absorb their school division. These two situations differ greatly in how they will ultimately impact the individuals in the school systems: students, teachers, and staff members. While the Allegheny County/Covington City merger represents a proactive effort to do what is best for the region as a whole and for the students and staff in both divisions, the process in Martinsville is quite different. In the latter instance, the consolidation is being pushed through by the local government in Martinsville with seemingly little concern for what it will mean for the school system in both localities. As such, a comprehensive comparative study of both locations would add to the literature of how school consolidations, and especially how outcomes differ in the short and long term.

Reflections of the Researcher

The process of collecting data, whether through the analysis of historical artifacts or the use of interviews (or both), can be quite informative. As the researcher, I have enjoyed learning about the communities and getting to know the educational stakeholders in the Allegheny

Highlands region. The people in these communities were incredibly welcoming to me as an outsider and I am grateful for their willingness to share their perspectives with me. I am by nature a people-person so the process of getting to meet with people, whether in-person or through some other modality, was important to me in determining what kind of study I wanted to conduct.

Without question, therefore, I credit the residents of the Alleghany Highlands region (both current and former) for the success of this effort. In my opinion, this consolidation of school divisions would not have been possible without the dedicated efforts of Jacob Wright and Jonathan Arrit—both of whom I view as true change agents. This consolidation effort was no small task and could easily have gone the way of prior failed efforts to consolidate. Instead, these two men persisted and were willing to “roll up their sleeves” and do the work necessary to see it through. As discussed previously, they made every effort necessary to overcome geographic and procedural barriers that had halted past attempts. As I have analyzed the consolidation efforts over the past 18 months, it has become increasingly apparent that it had very little to do with process or paperwork and everything to do with personal influence and relationships.

It should also be stressed that Arrit and Wright both deserve credit for bringing others into this process; without the inclusion of other key actors, it would, at the very least, have been inordinately challenging to enact this merger. Primarily, those individuals are Delegate Terry Austin and Covington Mayor Tom Sibold. Without the support of Mayor Sibold, this effort would have ended in rejection by Covington City in the same way of every past attempt. Instead, Arrit and Wright were able, through the development of a trusted relationship, to procure the support of Mayor Sibold who ultimately helped get the support necessary from the Covington City Council. Similarly, without Wright and Arrit’s willingness to reach out to Delegate Austin

as their representative, the General Assembly may not have made the financial package accessible. While Delegate Austin played an enormously important role in garnering support at the state level, I do not believe he would have made such an effort if he did not know that it had a significant and broad contingency of support at the local level.

Ultimately, this consolidation effort was made possible due to the convergence of a number of factors—and none more important than two individuals who wanted to see the community that they know and love have a promising future. The consolidation of schools in Alleghany County and Covington City may not be a guarantee of future success, but through the reduced duplication of efforts it is likely to, at the very least, have positive impacts on the future health and sustainability of these two communities.

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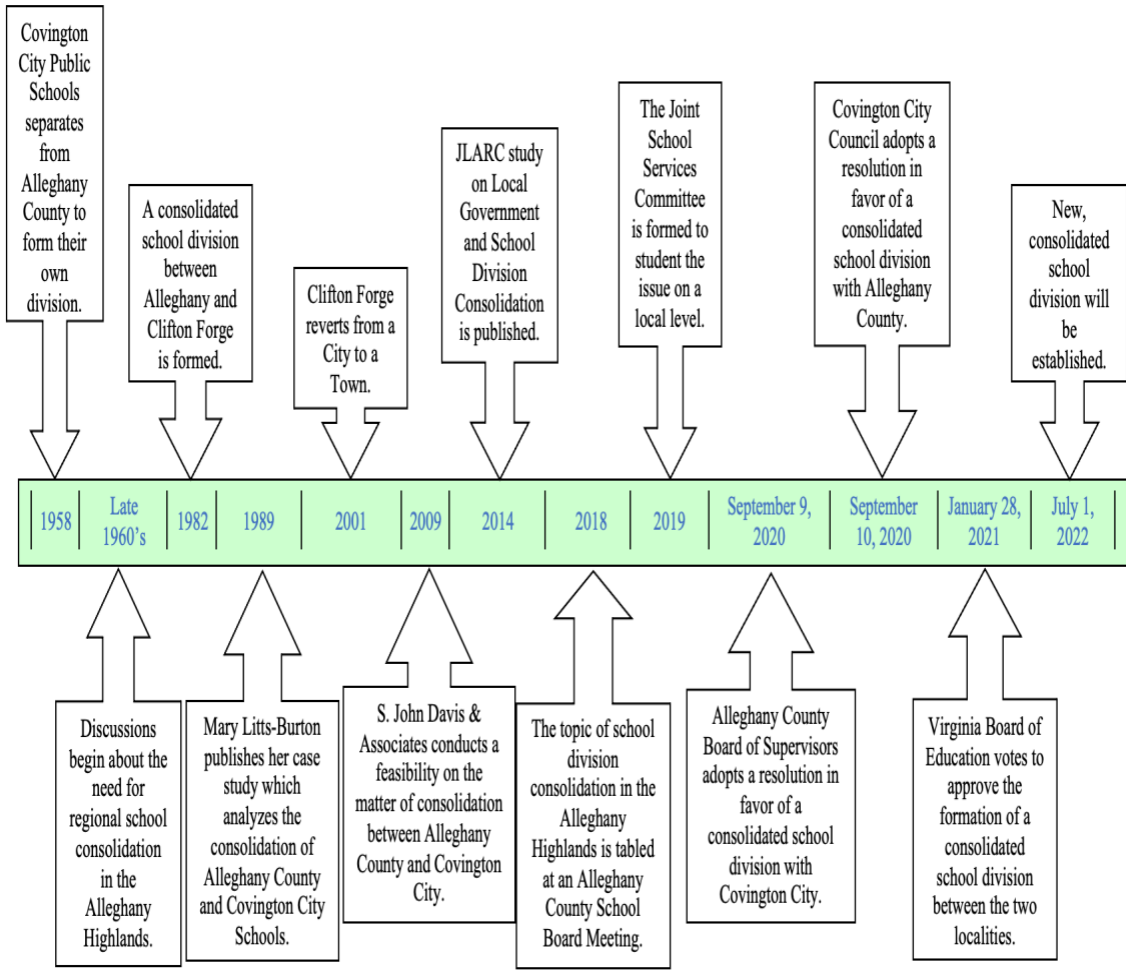
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APPENDIX A – A Timeline of Events Leading to Consolidation in Allegheny County and Covington City

**A Timeline of Events Leading to Consolidation in Allegheny County and Covington City
1958 - 2022**



APPENDIX B – Alleghany Grade Level and Total Enrollment

**Alleghany County Fall 2005 – Fall 2020
Student Enrollment by Grade Level**

Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2005-2006	N/A	311	226	224	245	210	241	221	213	213	230	229	187	178	2,928
2006-2007	N/A	276	216	216	231	248	218	248	220	212	227	219	203	189	2,923
2007-2008	26	251	205	212	204	231	246	223	253	220	238	213	181	211	2,914
2008-2009	83	250	168	213	215	214	237	238	220	251	222	202	183	200	2,896
2009-2010	37	266	189	175	205	215	208	243	235	227	270	213	175	190	2,848
2010-2011	51	270	166	181	169	210	219	208	236	234	231	241	179	209	2,804
2011-2012	42	245	191	160	174	169	212	219	205	242	241	214	207	207	2,728
2012-2013	41	223	162	181	162	169	167	210	218	201	253	231	186	230	2,634
2013-2014	35	207	144	159	170	154	169	163	201	221	222	229	200	200	2,474
2014-2015	23	186	136	140	162	165	147	170	167	194	215	206	201	218	2,330
2015-2016	29	174	140	139	146	154	168	159	169	165	212	210	170	223	2,258
2016-2017	76	174	131	144	138	149	156	186	158	178	193	200	179	182	2,244
2017-2018	77	180	128	132	153	134	145	163	187	162	180	174	180	195	2,190
2018-2019	84	178	135	128	130	159	134	146	156	172	164	165	143	190	2,084
2019-2020	104	186	131	136	132	124	147	150	143	155	170	148	141	157	2,024
2020-2021	54	190	136	126	138	134	129	151	139	136	157	167	133	162	1,952

Source: Virginia Department of Education

APPENDIX C: Covington Grade Level and Total Enrollment
Covington City Fall 2005 – Fall 2020
Student Enrollment by Grade Level

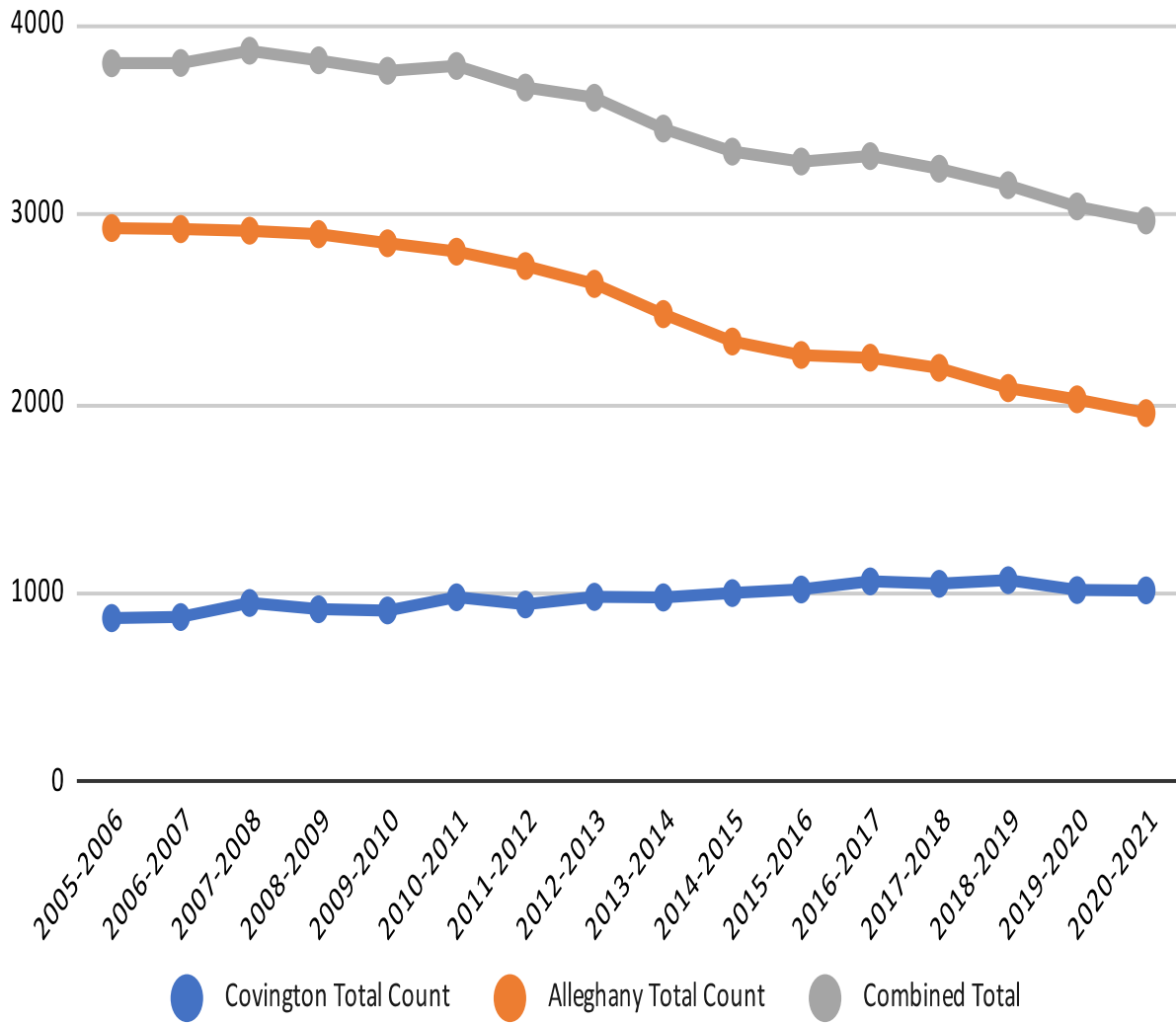
Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
2005-2006	36	62	64	51	58	78	57	65	52	70	74	87	62	54	870
2006-2007	N/A	81	69	68	53	56	75	60	71	61	68	74	75	65	876
2007-2008	57	77	78	64	71	56	55	76	62	79	62	72	70	71	950
2008-2009	50	71	76	74	68	66	46	58	75	69	75	61	63	65	917
2009-2010	47	68	69	70	83	70	74	46	59	75	66	69	51	63	910
2010-2011	88	68	64	77	71	84	73	71	50	67	72	69	63	63	980
2011-2012	95	65	65	62	74	66	80	73	65	52	60	76	52	57	942
2012-2013	91	71	68	76	61	76	77	83	67	66	62	64	64	56	982
2013-2014	59	94	80	69	70	61	76	75	81	73	59	58	56	68	979
2014-2015	53	88	92	73	78	68	67	76	72	85	74	68	55	53	1,002
2015-2016	53	81	85	87	72	76	64	69	77	77	93	74	59	54	1,021
2016-2017	72	91	84	81	85	76	73	62	67	80	75	88	68	62	1,064
2017-2018	59	94	82	77	71	92	77	67	67	66	77	73	84	65	1,051
2018-2019	54	86	94	80	81	77	87	76	74	73	70	72	66	80	1,070
2019-2020	35	76	78	88	77	82	75	82	69	79	72	65	76	64	1,018
2020-2021	28	78	75	78	87	71	80	73	86	76	81	72	61	70	1,016

Source: Virginia Department of Education

**APPENDIX D: Allegheny and Covington Combined Projected Enrollment Totals: 2005-
2020**

School Year	Covington Total Count	Allegheny Total Count	Combined Total
2005-2006	870	2,928	3,798
2006-2007	876	2,923	3,799
2007-2008	950	2,914	3,864
2008-2009	917	2,896	3,813
2009-2010	910	2,848	3,758
2010-2011	980	2,804	3,784
2011-2012	942	2,728	3,670
2012-2013	982	2,634	3,616
2013-2014	979	2,474	3,453
2014-2015	1,002	2,330	3,332
2015-2016	1,021	2,258	3,279
2016-2017	1,064	2,244	3,308
2017-2018	1,051	2,190	3,241
2018-2019	1,070	2,084	3,154
2019-2020	1,018	2,024	3,042
2020-2021	1,016	1,952	2,968

APPENDIX E: Total Enrollment Trends Including Combined Division



APPENDIX F: Interview Questions for Key Actors

The following paragraph will be used as an introduction to the interview with all interview subjects. From there, applicable questions for each key actor will be selected from the pool of questions listed below based upon their level of involvement and/or role.

Introduction: “As you are aware, Allegheny County and Covington City have reached an agreement that will create a consolidated school system in July 2022. After multiple feasibility studies and 40-50 years of discussions about this topic, some formal and some informal, in your opinion what was different this time around? How did the Allegheny Highlands end up here?”

Politics and Leadership:

- Why do you think it has taken so long for this consolidation to happen?
- How many times has it been “seriously” considered prior to 2019?
- In previous studies, the topic of Covington reverting to a town has come up as a possibility – did that impede the school consolidation approval process?
 - Do you think this most recent proposal being *only* about the schools played a role?
- From a student enrollment perspective, Allegheny and Covington are moving in two different directions – why do you believe Covington would agree to this merger?
- This topic has been discussed off and on going back to the 1960’s, but never reached this level. What conditions are different now?
- How have politics (local and or state) played a role over the years?
- Covington had two vacant City Council seats when they took a vote on the proposed merger – do you think the timing of this proposal was important to the final outcome?
- How much of a role does school division leadership play in this process?
- How much of the process relies on the desires of the local governing bodies?
- Allegheny had an Interim Superintendent during the final stages of this process, did that have any impact on the decision?

Facilities:

- Why was the decision made to vacate both middle schools when they are the most recently constructed buildings that each school division owns? Did the fact that they share a campus with intermediate schools play a role? What is the planned use for the middle school sites?
- Both current high schools, which will be used to house the student bodies of the consolidated middle and high schools, are quite old (Covington – 1939 (additions and renovations since), Allegheny – 1963 (renovations since)) and a feasibility study conducted in 2009 recommended the construction of a new high school. Do you believe a new high school will be built in the near future?

Community:

- Were community members given enough of a voice in this process?

- People love their football games on Friday nights – this merger will mean that games will not be played onsite at the high school campus AND that a new school with a new name and mascot will take the field in 2022. How will the community react to that?
- The Code of Virginia §22.1-25 related to the formation of a school division requires “public input” but does not require a public referendum. If such a referendum had been required, do you think this merger proposal would have passed?
- There was at least one public hearing on the proposed merger and based on the minutes from this meeting, the overwhelming majority of people spoke out against the merger. Were those concerns taken into consideration by the Joint School Services Committee?
- Insight 20-20 Poll:
 - Who conducted this?
 - Target population?
 - When was it administered?

Financial Considerations:

- How were Creigh Deeds and Terry Austin contacted about this process? Who initiated the discussion?
- At what point was the decision made to request lump-sum funding from the General Assembly?
- How will the LCI calculation be done once the divisions are combined?
 - This was also listed among the pros from the CJSS even though the difference is negligible between the divisions and Covington is actually slightly higher.
 - Alleghany: 0.2819
 - Covington: 0.2913
- The Joint School Services Committee received approximately \$400,000 to explore the merger (9/5/2019 JSSC meeting minutes)
 - Who requested those funds?
 - Leftover monies were to be directed to Jackson River Technical College – were there any remaining funds?
- How many feasibility studies have been conducted to explore this merger during the last 50-60 years?
 - Is there any way to estimate this cost?

Note:

- Different questions may be asked as follow-up questions to those listed above based on responses provided. Any additional questions will be included in the report of findings.

APPENDIX G: Research Questions by Topical Area and Applicable RQ

Topical Area of Interest	Specific Research Questions	Applicable RQ
Politics and Leadership	Why do you think it has taken so long for this consolidation to happen?	RQ1
	How many times has it been “seriously” considered prior to 2019?	RQ2
	In previous studies, the topic of Covington reverting to a town has come up as a possibility: (a) Did that impede the school consolidation approval process? And (b) Do you think this most recent proposal being “only” about the schools played a role?	RQ1
	From a student enrollment perspective, Alleghany and Covington are moving in two different directions – why do you believe Covington would agree to this merger?	RQ2
	This topic has been discussed off and on going back to the 1960’s, but never reached this level. What conditions are different now?	RQ2
	How have politics (local and or state) played a role over the years?	RQ2
	Covington had two vacant City Council seats when they took a vote on the proposed merger – do you think the timing of this proposal was important to the final outcome?	RQ1
	How much of a role does school division leadership play in this process?	RQ1
	How much of the process relies on the desires of the local governing bodies?	RQ1
	Alleghany had an Interim Superintendent during the final stages of this process, did that have any impact on the decision?	RQ1
Facilities	Why was the decision made to vacate both middle schools when they are the most recently constructed buildings that each school division owns? Did the fact that they share a campus with intermediate schools play a role? What is the planned use for the middle school sites	RQ1
	Both current high schools, which will be used to house the student bodies of the consolidated middle and high schools, are quite old (Covington – 1939 (additions and renovations since), Alleghany – 1963 (renovations since)) and a feasibility study conducted in 2009 recommended the construction of a new high school. Do you believe a new high school will be built in the near future?	RQ3
Community-related Concerns and Issues	Were community members given enough of a voice in this process?	RQ1
	People love their football games on Friday nights – this merger will mean that games will not be played onsite at the high school campus AND that a new school with a new name and mascot will take the field in 2022. How will the community react to that?	RQ1
	The Code of Virginia §22.1-25 related to the formation of a school division requires “public input” but does not require a public referendum. If such a referendum had been required, do you think this merger proposal would have passed?	RQ1

	There was at least one public hearing on the proposed merger and based on the minutes from this meeting, the overwhelming majority of people spoke out against the merger. Were those concerns taken into consideration by the Joint School Services Committee?	RQ1
	Regarding the Insight 20-20 Poll. Who conducted this? What was the target population? When was it administered?	RQ2
Financial Considerations	How were Creigh Deeds and Terry Austin contacted about this process? Who initiated the discussion?	RQ3
	At what point was the decision made to request lump-sum funding from the General Assembly?	RQ3
	How will the LCI calculation be done once the divisions are combined?	RQ3
	The Joint School Services Committee received approximately \$400,000 to explore the merger. Who requested those funds? Leftover monies were to be directed to Jackson River Technical College: Were there any remaining funds?	RQ3
	How many feasibility studies have been conducted to explore this merger during the last 50-60 years and is there any way to estimate those costs?	RQ2