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A Case Study Analysis of the Problems Associated with Declining Enrollment in Selected School Districts of Cook County, Il.

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A CASE STUDY ANALYSIS OF THE PROBLEMS ASSOCIATED WITH
DECLINING ENROLLMENT IN SELECTED SCHOOL DISTRICTS
OF COOK COUNTY, IL

by

Don L. Lambert

A Dissertation Submitted to the Faculty of the Graduate School
of Loyola University of Chicago in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Education

April

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The interest and encouragement of my office associates must also be mentioned.

Lastly, I would like to thank my wife and family for their willingness to work and play alone as I set aside the necessary months to complete the study.

VITA

Don L. Lambert, the youngest of thirteen children, was born in Beaverville, Illinois, August 28, 1938. He attended Donovan High School in Iroquois County and graduated in 1956.

He attended Illinois State University in Normal and received a B.S. in Science in 1960 and an M.S. in Psychology in 1963. He was licensed as a Registered Psychologist in the State of Illinois in 1971 and was listed in the National Register of Health Care Providers in 1975.

He has been employed as a teacher at the elementary and high school levels. He served as a school psychology intern at the elementary, high school and junior college levels. He has been employed as a psychologist, director of pupil personnel services, chief of psychological services and administrator in a special education cooperative. He is currently employed as Director of Student Services for Cicero School District 99.

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CHAPTER I

STATEMENT OF THE PROBLEM

Introduction

In 1950 there were 28 million pupils enrolled in elementary and secondary schools throughout the United States. Ten years later this population had exploded by 52 percent and totaled 42.7 million students. Also in 1960 births hit an all time peak with 4.35 million live infant births. The number of women at child bearing age bottomed out at about 11 million and this population was projected to expand to over 16 million during the sixties. All indications seemed to predict another more significant boom to the baby boom generation of the forties.

The nation was growth oriented in its standard of living, in its corporations and its population. Little wonder that the first birth rate drop of 1957 went practically unnoticed. The birth rate continued to drop until 1969 and 1970 when it turned around briefly. In 1971 the birth rate showed a serious drop and in November of 1973 hit an all time low of slightly under 3.2 million, a figure more than one million less than in 1960.

George Grier of the Washington Center for Metropolitan Studies was among the first to examine some of the social and economic consequences associated with declining birth rate with his 1971 report, "The Baby Bust." As was to have been expected, for the first six years after 1961 when the birth rate began to decline, school enroll-

ments continued to grow and school districts kept building to keep up with this enrollment growth. In 1969-70 both kindergarten and first grade enrollments started to decline and in 1971 the total elementary and secondary population reached a peak of 51.4 million students. Meanwhile, some elementary enrollments in some communities were down to the point where empty classrooms were appearing, teachers were being dropped and state aid that was based on an average daily attendance or membership type of formula was being reduced.¹ Declining enrollment and how to cope with it had moved to a similar theme of the seventies as was growth for the forties and fifties.

Since district financial conditions vary throughout the State of Illinois, no definite predictions regarding school closings in Illinois have been made, but researchers state that beginning in 1978 the number of elementary buildings in operation could begin a dramatic decrease. It has been predicted that by 1985-86 as many as 1,000 fewer schools could be in operation than in the peak enrollment year of 1971-72.² Thus it has appeared useful to look more closely at those complex phenomena which result in the closing of school buildings.

The Problem

The purpose of this study has been to analyze the manner in which selected school districts experiencing declining enrollment coped with

¹ Educational Facilities Laboratories Fewer Pupils/Surplus Space (New York: EFL, [1974]), p. 8.

² "Expect Enrollment Decline to Continue," Illinois Education News, October 1976, p. 1.

and sought to resolve the significant problems defined by the literature as associated with declining enrollment. Further, the purpose of the study has been to analyze the decision making processes employed by the districts to arrive at the solutions to the significant problems encountered.

The major focus has been to re-establish the issues faced by the boards of education and the central administrative staffs from the time of initial projection of declining enrollment through utilization of space created by school closings. To a lesser extent, the teaching staffs, the students, and the communities have been considered in the study. The study has been prepared in such a manner that members of a board of education, school administrators, or other practitioners in the field of education can gain increased insights into the declining enrollment dilemma and learn from the case study.

In accomplishing this purpose, this study has:

1. Investigated and reported upon the way in which selected school districts have coped with and have sought to resolve the major problems paramount to districts experiencing declining enrollment.
2. Analyzed the similarities and differences between selected school districts regarding the following:
 - A. Consequences of the major problems within the selected school districts.
 - B. Rationale by which school districts have attempted to find solutions to the problems associated with declining en-

rollment.

- C. Compared the findings derived from the study within selected school districts with what the literature recommended regarding the management of these problems.
 - D. Analyzed the implications for administration, boards of education, and staff as related to the problems associated with declining enrollment.
3. Suggested direction to school administrators and school boards for averting some management problems associated with the realities of declining enrollment.

Significance of the Problem

Declining enrollment has become a major problem affecting public education in Illinois since 1971-72 when enrollment reached a peak. Each individual school district has a special need to examine enrollment trends. Only by promoting a clear and reliable analysis of the major issues and side issues associated with declining enrollment can a school district adequately prepare to provide responsible school administrative leadership during the critical years ahead.

Declining enrollment will cause major problems for the school administrator in the years ahead. Joseph Cronin, Illinois State Superintendent of Education, reports that between 1972 and 1984 school population will decline by 20% or approximately 400,000 students.¹

¹"State Superintendent Speaks on Teaching Jobs," Illinois Education News, November 1976, p. 1.

It has been further reported that by 1985-86 teacher reductions equal to 4,398 for grades 1-8 and 2,465 for grades 9-12 will be experienced.¹

The significance of the problem may be further magnified by the fiscal crisis affecting many Illinois school districts. This crisis is assuredly related to spiraling inflation, the inability of school districts to pass referendums, and the level of State funding both for general education and mandated special instructional programs. In addition, this fiscal dilemma is heightened by a reduction in State pupil attendance aid prior to such a time that enrollment decline has reached a level significant enough to allow districts to reduce global expenditures.

Even though the State of Illinois has been experiencing declining enrollment during most of the past seven years, relatively few districts have yet experienced declining enrollment significant enough to close one or more attendance centers. Since administrators rely heavily on the successful and unsuccessful experiences of practitioners who have dealt directly with a problem, this study has dealt exclusively with districts that have closed multiple schools resulting from enrollment decline.

Method and Procedure

Five major problems associated with districts experiencing declining enrollment have been derived after studying the professional

¹"Expect Enrollment Decline to Continue," Illinois Education News, October 1976, p. 1.

literature:

1. The first significant problem is that of projection of school enrollment. The literature stresses the necessity of adopting a formal method of study in order to adequately project enrollment trends. The method of study selected should be comprehensive in design so that factors affecting trends may be isolated and analyzed.
2. The economics of declining enrollment is a further problem. School districts must be able to match revenues to expenditures. The accomplishment of this task is seriously complicated by changing levels of state or local funding. The legislative process affecting at least state level funding often complicates and contradicts responsible projection of school revenue.
3. The decision to close a facility is one of the most traumatic problems to be dealt with in association with declining enrollment. Widespread involvement of both school and community personnel has been advocated. The criteria supporting a facility closing should be clearly defined.
4. Staffing issues constitute another major problem. Teacher supply and demand is a primary logical consequence of enrollment decline. Primary staffing issues could include teacher-administrator relationships, bargaining issues, and school board policy considerations. Maintaining compliance with state legal codes is a further concern related to staffing

issues.

5. In sequence of planning the decision to use surplus space may come after the level of emotion has somewhat subsided, but is of itself an emotion provoking problem. The use of surplus space may allow for program development opportunities; however, typically the fiscal condition of a district is such that leasing or sale is a more commonplace alternative.¹

The case study method has been the principal technique used to collect data to study the five major problems defined as most relevant to school districts experiencing declining enrollment.

The following variables were applicable to each of the districts selected for study:

1. Since this study traced and analyzed the chronological process of selected school districts in which decisions were made associated with resolving declining enrollment problems, each district must have experienced each of the major problems associated with declining enrollment as defined by the literature. These major problems included projection of student enrollment, fiscal crisis, reduction in force, school closing, and management of surplus space.
2. In order to avoid biased indications of enrollment decline

¹ Report of the Illinois Task Force on Declining Enrollments in the Public Schools, by Howard Brown, Chairman (Springfield, Illinois: Illinois Office of Education, 1975), pp. 1-66.

that could be created by the reduction of a few students in a small district, school districts selected for the study must have had student enrollment greater than 1500 students. Conversely, in order to avoid management options that would be specific to fewer than twenty large school districts, those selected for study must have had enrollment of less than 10,000 students.

3. In order to avoid bias, associated with extraordinary local fiscal commitment, school districts demonstrated a local tax commitment of at least 1.90 which is currently equivalent to the State resource equalizer method of calculating State aid. The 1.90 commitment includes the combined tax rates for the education fund, building fund, I.M.R.F., and the working cash fund.
4. Since it has been predicted that approximately one thousand of the one thousand and fifty schools to be closed by 1985 will be elementary schools, this research was limited to the study of elementary school districts.¹
5. In order to provide for comparable management options, each school district at the time of initial reduction in force must have had management options restricted similarly by negotiated teacher organization contracts.

¹ "Expect Enrollment Decline to Continue," Illinois Education News, October 1976, p. 1.

6. In order to allow for the effect of experience upon the management decision making process, each school district must have had a superintendent with at least five years' experience in a position of school superintendent.
7. The school districts selected for study must have had assessed evaluation supporting each student of at least 20,000 dollars.
8. One of the most valuable outcomes of this study has been drawn from an analysis of administrative side issues, options, and propensity to draw from prior experiences. This study, therefore, was further limited to school districts that have experienced multiple school closings prior to July 1, 1977.
9. Finally, by logical assumption the school districts must have been willing to open their records, decisions, and judgments to the case study research process.

The study was limited to districts within Cook County because of the unique density, vast socio-economic diversity, and broad spectrum of district types specific to the County. The total population of districts (two) within Cook County reflecting all of the above variables have been studied through the in-depth case study research method described subsequently in this dissertation.

Essentially, the case study data collection was based upon interviews with administrative, board of education, and teaching personnel. Pertinent portions of documents were analyzed including board minutes, policies, negotiated agreements, financial data, and school memoranda.

The findings of the case study have been described in a narrative report. Highlights described within the report include a reconstruction of the strategies developed within the districts used to avert and/or deal with each of the five major problems addressed by the research. Further described are the strategies implemented to cope with and/or resolve each of the defined problems. The impact upon the people involved regarding the problems of declining enrollment which culminated in the closing of school buildings has also been highlighted in the report. The impact upon people--parents, teachers, principals, and the board of education--is described as the major concern associated with resolving declining enrollment problems.¹ A survey of concerns of people listed in the above categories was conducted. Responses to the question, "What were your major worries regarding the closing of the . . . School in your district?" have been solicited. Information acquired from randomly selected face to face interviews and telephone interviews have been reported and the information contrasted to the probable "worries" of each group as reported in the literature.² Since descriptive research is often preliminary to research using more rigorous control and objective methods, strict statistical applications were not employed in selection of the survey sample.³ An attempt was

¹ Katherine E. Eisenberg, William F. Keough, Declining Enrollment: What to Do, AASA Executive Handbook Series, vol. 2 (Arlington: American Association of School Administrators, 1974), p. 10.

² Ibid., pp. 24-25.

³ Walter R. Borg, Educational Research (New York: David McKay Company, Inc., 1963), p. 202.

made to interview all members of the boards of education and all principals from each of the districts studied. In accord with small sample selection techniques, an attempt was made to interview at least twenty-five teachers and parents from each district.¹ Teachers and parents previously resident of or employed at the closed schools were selected for survey in proportionate numbers to the population of the district at large. Finally, the report describes the documentation derived during the case study process to support or refute the subjective information reported in interviews.

The reconstructed sequence of events documented to have occurred within each district have been analyzed according to a problem solving model used to assist in determining logical decision making behaviors. The problem solving model is based upon five steps including identification of a concern, diagnosis of the situation, formulation of action alternatives, feasibility testing of selected alternatives and adaptation and diffusion.²

Two committees were selected to employ the decision making model and subsequently to provide a data base upon which to compare and contrast the similarities and differences between districts regarding the interpretation of the problems as well as the development and implementation of strategies to resolve the problems. Each of the two

¹ J. P. Guilford, Fundamental Statistics in Psychology and Education (New York: McGraw-Hill Book Company, Inc., 1950), p. 183.

² "Research Utilization Problem Solving Model for Educational Change", Northwest Regional Laboratory, paper delivered at Educational Training Consultants Leadership Conference, Bethel, Maine, June 1968. (Mimeographed.)

committees selected to compare and contrast the strengths and weaknesses of decisions made regarding procedures, methodology and management transactions were composed of persons with extensive management experience.¹

Five observers in management positions outside of the public schools, responsible for budgets greater than 1,000,000 dollars were selected to compose one committee. Persons selected had at least a baccalaureate degree in administration or management and at least five years experience. Further, five observers holding superintendent of schools positions outside of the districts studied composed the second committee. Each member of each committee independently ranked the problem solving activities, documented to have occurred within each district, according to the problem solving model.

Comparison and analysis were made between the ranking of the management observers' ratings regarding each district and between the ranking of the school observers' ratings for each of the districts. Further, comparison and analysis was made regarding the management observers' ratings between each of the two districts. Similar comparison and analysis was made regarding the school observers' ratings between each of the districts. In addition, management and school observers classified each documented activity on the basis of professional judgment as either an essential or non-essential activity

¹Ernest R. House, et al., Advocacy in a Non-Rational System (CIRCE, University of Illinois, Urbana, Illinois, November 1970), pp. 1-7.

regarding the solution of a problem.¹ Comparison and analysis of the essential or non-essential quality of each activity was made in a similar manner as that described immediately preceding for the analysis of ratings using the decision making model.

The impact upon people regarding the closing of school buildings was compared and contrasted between each category of people in each district as well as with the professional literature. Each response of parents, teachers, principals, and members of the school board were grouped according to similarity of concern content. The concern responses were then grouped according to each respondent category. The degree of concern represented by each category of respondents was reflected by the frequency of responses made by persons within the category.² The responses of persons from each category from each district were compared with each other and with probable responses reported by the literature.³

Finally, implications for administrators, boards of education, staff, and education for the 80's in Illinois have been derived based upon critical analysis of the research findings.

¹ Allen W. Barnes, "A Historical Case Study of the 45-15 Continuous Year Round School Plan" (Ed. D. dissertation, School of Education, Loyola University, 1972), p. 122.

² Gladys L. Anderson and Harold H. Anderson, ed., Projective Techniques and Other Devices for Understanding the Dynamics of Human Behavior (Englewood Cliffs: Prentice-Hall, Inc., 1951), p. 286.

³ Eisenberger, Keogh, pp. 25-26.

Assumptions

The development of the study depends on some basic assumptions:

1. School administrators have had insufficient information regarding the development of strategies to accurately predict declining enrollment and to develop plans for solution of the problems associated with a significant decline.
2. The decline of school enrollment and the closing of public school buildings will continue to increase dramatically throughout the United States.
3. School districts that have experienced multiple school closings provide a more valid source for data collection, evaluation strategies and research strategies, therefore making such districts a unique setting for case study dissertation research.
4. Material of a case study type is vital since many administrators in the near future when faced with similar problems may have data regarding the problem to analyze, discuss, criticize, or use as a base for developing local strategies.
5. The problem solving model utilized in the study was selected for its empirical-rational nature. The model assumes that a systematic approach will be chosen to solve a problem as opposed to a number of other approaches such as use of intuitive judgments, course of least effort, personal satisfaction, or pure empiricism.

Definition of Terms

Case Study--a procedure which takes into account all pertinent

aspects of one thing or situation.¹

Problem Solving Model--a process of solving a problem in a systematic manner. The "problem solving model" utilized in the study includes five steps:

1. Identification of a concern: Who is causing it and who is affected by it? What specific goals would need to be attained in order for it to be resolved? What kind of problem is it?
2. Diagnosis of the situation: Once the problem has been clearly stated in terms of goals to be attained, it is necessary to push toward or against a particular goal. As the true forces are identified, goals which were first thought to represent a solution are viewed as incorrect or inadequate. New goals must be stated and new forces identified.
3. Formulating action alternatives: As diagnostic work progresses, a range of action alternatives should emerge. Each should be considered in relation to knowledge of the forces operating in the problem situation. If one or some combination of the alternatives is tried, what will happen to the forces pushing toward or away from a particular goal? How will the forces operate to influence the success or failure of a trial of a particular action alternative?
4. Feasibility testing of selected alternatives, including training and evaluation: At some point, one or a combination

¹ Carter V. Good and Douglas E. Scates, Methods of Research (New York: Appleton-Century-Crofts, Inc., 1954), p. 776.

of action alternatives will be attempted. As the attempt is made, information will be needed to assess whether there is movement toward the goals. Feasibility testing includes discovery of the forces which are changing to understand what is accounting for movement, or the lack of it. Feasibility testing includes an assessment which provides both an evaluation of progress and new diagnostic pictures. The evaluation of progress and the new diagnostic picture clarifies the next action steps which need to be taken. Finally, feasibility testing may identify additional skills which may be needed in order to move ahead.

5. Adaptation and diffusion: Information gained from action experience in dealing with a problem should be shared with others who face similar problems. Information to be diffused should include: a clear, specific problem statement; the forces involved in the problem situation; a description of action taken to change the forces; results of action including failures as well as successes; special problems that were encountered; and special skills that were needed to carry out particular actions. These kinds of information make it possible for persons in another setting to adopt elements of what was tried to their own diagnosis of their particular problem situation.¹

¹"Research Utilization Problem Solving Model for Educational Change," Northwest Regional Laboratory, paper delivered at Educational Training Consultants Leadership Conference, Bethel, Maine, June 1968. (Mimeographed.)

Fiscal Crisis--condition existing when expenses exceed income to such an extent that there is no possibility in the foreseeable future to match income to expense.

Reduction in Force--condition resulting in the transfer of teachers or job elimination due to declining enrollment.

Management of Surplus Space--the partial or total rededication of a school building from its original use through partial leasing, total leasing, "moth balling," selling, razing the building, and selling or otherwise using the land.

Multiple School Closings--the closing of three or more school buildings.

CHAPTER II

SELECTED REVIEW OF THE LITERATURE

Five specific areas of the literature were related to the study. In order to facilitate the review of literature, the material has been organized to correspond to the five major problems previously defined as associated with districts experiencing declining enrollment. A sixth area has been established which includes selected literature related to more than one of the major problems. The review of literature has been begun with this category.

The first specific area deals with projection of school enrollment. The area was reviewed to assess the methodologies used to project enrollment patterns and to review the factors identified by the literature as affecting enrollment projection.

A second area is related to the impact of the economics of declining enrollment. A review of the literature associated with school expenditures required to most economically operate schools as well as to determine when to close them was undertaken. In addition, a review of assistance required by school districts was also completed.

A third area reviewed was that of facility closings. The review included the aspects of widespread community involvement in the process and a review of the criteria for facility closing.

A fourth area under study were those various aspects associated with staffing issues. Some staffing issues included teacher supply and

demand, reduction in force and compliance with the School Code.

The last area considered in the chapter deals with the impact and consequences of surplus space. Use of surplus space, program development opportunities as well as leasing and sale of school facilities have been key considerations by many of the authors reported in the literature.

General

Frequently school districts must use new space by sharing with other groups that can also share the cost of the facility. The Executive Handbooks prepared for the American Association of School Administrators concluded that joint occupancy is considered not only economically preferable, but educationally advantageous.¹ Such an arrangement brings children into direct contact through daily interaction with the out-of-school world in which they live. AASA also suggested that districts may wish to share space with other districts. In theory, inter-district sharing is a viable fiscal solution to enrollment decline.² AASA warned, however, that in practice such a leasing system is almost impossible to effect due to community resistance.

In addition, the handbook dealt succinctly with other major problems including: 1) enrollment prediction; 2) community involvement and management; 3) personnel management; 4) facility closing. The

¹
Katherine E. Eisenberger, William F. Keough, Declining Enrollment: What to Do, AASA Executive Handbook Series, Vol. 2 (Arlington: American Association of School Administrators, 1974), p. 37.

²
Ibid., p. 42.

handbook features a graphic timetable dealing with school closings as well as a comprehensive appendix including prediction charts, school closing checklists, and a survey questionnaire regarding the closing of a school.

The Illinois Task Force on Declining Enrollment has published a comprehensive report specific to declining enrollment in the State of Illinois. Highlights of the 1975 report include: 1) a summary of the problems and opportunities associated with declining enrollment; 2) an outline of some of the major issues and options; 3) a summary of practical suggestions to local districts; 4) some guidelines for planning at the State and local level; 5) recommendations for State level study and action.

The 1975 Illinois Office of Education Task Force report concluded that in most states a reduction in the number of students immediately resulted in loss of financial support on a per pupil basis. The implicit assumption is that once a student disappears, the costs associated immediately disappear; this assumption is in error. The Task Force report explained that there is a time lag of three years or more before the loss of a modest number of students enables a school district to cut costs.¹

A summary of the Task Force's research and an outline of its recommendations has been edited by Gar Brown. The summary document

¹Report of the Illinois Task Force on Declining Enrollments in the Public Schools, by Howard Brown, Chairman (Springfield, Illinois: Illinois Office of Education, 1975), p. 34.

focuses upon past, present and future school enrollments, fiscal problems, use of surplus space, and school closings.

Statistical highlights of past and future enrollments, class size, teacher needs, and cost relationships have been treated in a report prepared by the Statistics Section of the Illinois Office of Education, "Declining Elementary and Secondary Enrollments in Illinois: An Overview of Implications," 1975.¹ State of Illinois enrollment trends are discussed and enrollment trends by county are presented graphically. The consequences of enrollment trends including those associated with facilities, revenues and expenditures and impact upon higher education are the major focal points of the report.

The comments pointing out the positive effects of declining enrollment made by the New York Commissioner of Education were printed in an article published by Inside Education. Edward B. Nyquist pointed out the following potential positive effects of declining enrollment:

Declining enrollments should be an opportunity to reduce class size and give students more attention, to consolidate school districts, develop community education centers and teacher self renewal centers, and adult education; to achieve racial integration, provide more early childhood programs, better programs for the gifted and talented, and more programs for the handicapped.²

Commissioner Nyquist did not offer financial solutions for implementing his priorities but did acknowledge that any of the positive effects

¹Statistics Section, Illinois Office of Education, "Declining Elementary and Secondary School Enrollments," Springfield, 1975. (Mimeographed.)

²Edward B. Nyquist, "Nyquist Lists His Priorities for the Year," Inside Education 62 (November 1975): 6.

could be severely limited in a time of fiscal limitation.

Fewer Pupils/Surplus Space by Educational Facilities Laboratories, Inc., described enrollment trends in detail and began to identify a process for developing a declining enrollment plan. After an extensive review of population statistics, the authors conclude that school enrollment will drop by 2.3 million students between 1973 and 1980 but that the extent of decline through 1980 depends on the size of families yet unborn. National mobility trends are discussed in detail in relationship to the planning for an uncertainty concept often associated with enrollment projection. The authors reviewed an extensive list of facility use options. An option not often discussed by other authors was that of trade or exchange of property. They conclude that establishing priorities ahead of time for the disposal of schools helps to clarify the options and eases the closing processes.¹ Atlanta was noted as a model for having drawn up such priority lists. The treatment of the process of school closings provides a discussion of some helpful hints to the process as well as some helpful safeguards against making irrevocable decisions. An excerpt entitled "Fewer Pupils, Surplus Space: The Problem of School Shrinkage," has been printed in a 1975 issue of the Phi Delta Kappan.²

¹ Educational Facilities Laboratories, Fewer Pupils/Surplus Space (New York: Educational Facilities Laboratories, Inc., 1974), p. 38.

² Cyril G. Sargent, "Fewer Pupils, Surplus Space: The Problem of School Shrinkage," Phi Delta Kappan 56 (January 1975): 352-357.

The Superintendents' Round Table of Northern Illinois sponsored a Superintendents' Study Club on September 23, 1977, at Oak Brook, Illinois. The subject of the study club was "Reduction in Force." Dr. Joseph E. Hill and Dr. Wesley Gibbs presented papers reviewing administrative problems caused by reductions in force due to declining enrollment together with some solutions.

Dr. Gibbs presented a paper in which he stressed the essential nature of projecting student enrollment. He stated that based upon sound criterion from which to project, a reduction in force plan could be developed accurately for periods of two to five or more years into the future. Dr. Gibbs presented a sequence of steps which he indicated effective to predict the number of teachers needed for specialized high school areas for at least three years into the future. Dr. Gibbs reported that by use of the system student enrollment for fall 1977, predicted in 1974, was within seven students of the actual enrollment. He suggests the following steps have proved reliable for projecting staff needs within Niles High School District 65: 1) obtain fall enrollment by grade and district for all feeder districts; 2) establish enrollment trends for the past and present by use of the Cohort Survival Method and analyze the central tendency of the averages obtained; 3) develop enrollment projections by grade and by district of the component districts; 4) determine average course load for students enrolled in high school and multiply by projected enrollment figures to determine numbers of total courses required for a given year; 5) develop department enrollment statistics by level and convert to projections; 6) take

projection factors and apply to total projection divided by teacher caseload; 7) analyze projected teacher needs by department and compare with employed tenure staff by department. Dr. Gibbs has successfully employed this system to reduce staff from a total teaching staff of 556 in 1972 to 420 staff in 1977 without dismissal of any tenured personnel. The District 219 Board has adopted a policy which strives to retain all tenured teachers. Furthermore, they have successfully removed a teacher transfer clause from the negotiated contract. The Board has resolved to close one high school in 1980. A faculty advisory committee has been established to develop recommendations regarding a suitable transfer plan.

Dr. Gibbs reported a number of practical suggestions for facilitating reduction of tenure staff without using lay off. He recommended a liberal leave of absence policy since District 65 statistics indicate that only thirty percent of people on leave return to teaching. He advocated that teachers be allowed to take other employment while on leave. Dr. Gibbs suggested that each year five persons from each building, judged most in need of supervision, be provided with intense supervision. The nature of the supervision is carefully logged and reported. The results of the supervision process include improved instructional performance, issuance of some letters of remediation, and the resignation or dismissal of some staff. The rate of resignations from this population shows a marked increase over staff in general. He further suggested an analysis of tenure teacher credentials to isolate that population with dual certification or near dual certifications.

The Board retains the option to pay for courses that would allow teachers to complete dual certifications. Transfers of personnel into dual teaching assignments are made using only the most pedagogically distinguished staff available within the district. The transfer practice has been well publicized and has resulted in teachers assuming what could be considered an adverse assignment even after being given the opportunity to retain a former more desirable assignment. A significant side issue of this practice has been a tendency to create a predominately male physical education staff to teach boys and girls physical education. Finally, Dr. Gibbs recommended an early retirement provision which may be elected by staff between the ages of sixty-two and fifty-seven years of age. He indicated such a program should be restricted to persons under sixty-two years of age if such a program is to have fiscal advantage to a school district.¹

In his paper Dr. Hill stressed a moral obligation of districts to establish reduction in force policies and practices that would not have the affect of eliminating minority staff persons. He reported that if districts use a strict seniority system to implement reduction in force, minorities must be the first to be released since research indicates that they have been the last to have been employed. He promoted utilization of a system based upon job performance and reported that District 65 estimates the cost to dismiss a tenured teacher to be at

¹
Wesley Gibbs, "Reduction in Force, Problems and Solutions," paper presented at the Superintendents' Study Club at a meeting of the Superintendents' Round Table of Northern Illinois, Oak Brook, Illinois, 23 September 1977.

least 30,000 dollars. Dr. Hill hypothesized that such a cost to remove a marginal performer distributed among thirty children each year over the possible number of years in a teaching career is a highly justified educational expenditure.¹

A questionnaire survey was administered to ten district superintendents in Los Angeles County by Gary A. Burgner to determine the perceived effects of declining enrollment on unified school districts. Burgner concluded that the cohort survival method of projection produces accurate results and that attrition will usually meet the need for reduction of force.² He further stressed the need for comprehensive communications and advanced planning.

The legality of sharing facilities with churches has been a frequent issue to districts responsible for vacant buildings. This issue has taken on new prominence as related to an added source of revenue for school districts experiencing fiscal crisis as well as for school districts seeking occupants for surplus schools. In 1974, the Wisconsin Attorney General opined that school buildings may be only used by churches during non-school hours if each of the following tests were met:

- 1) The arrangement was for a limited, specific time period.

¹ Joseph E. Hill, "Rifing," paper presented to the Superintendents' Study Club at a meeting of the Superintendents' Round Table of Northern Illinois, Oak Brook, Illinois, 23 September 1977.

² Gary A. Burgner, "The Perceived Effects of Declining Enrollment on Selected Unified School Districts in Los Angeles County" (Ed. D. dissertation, University of Southern California, 1977), pp. 97-98.

- 2) A reasonable rental was charged.
- 3) There was not school involvement in the religious function.
- 4) All religious organizations were treated equally and no preference was given to one group over another.¹

Donald Thomas, an administrator who has experienced declining enrollments and has coped with the resulting problems, presented an overview along with an outline of the strategy for closing a school followed by specific suggestions for reducing staff. The author indicates that community conflict cannot be avoided but that it can be controlled by intelligent leadership by the board of education and the superintendent. Thomas indicated that decisions must be made about: the use of citizens' committees, the use of local consultants, the use of outside consultants, the preparation of demographics, the use of community surveys, the use of staff personnel, the release of information, and the involvement of the media. The author proceeded to discuss the process that was followed in the Salt Lake City school closings. He suggested the following practices to preserve school board credibility: make all information public at the same time it is given to the board of education, hold only public meetings, send all reports to community decision makers, establish tentative solutions and show modifications made because of public hearings, work closely with the media, and keep parents and students informed.² Among the effective strategies for

¹ "Use of School Facilities by Religious Organizations." Wisconsin School News 30 (September 1975): 8.

² Donald Thomas, "Strategies for Closing a School, Reducing Staffs," NASSP Bulletin 61 (March 1977): 10-11.

reducing staffs, the author suggested developing staffing needs based upon mid-year projections to avoid hiring too many staff at the beginning of the school year. In addition, adoption of an early retirement plan; termination for cause; working with neighboring school districts; developing a trained core of substitutes; having everyone become a project writer; and in unit districts, training secondary teachers for elementary positions, are suggested as possible further considerations.¹

The National School Boards' Association research report number 1976-1, "Declining Enrollment" reviewed birth rate and migration as causative factors of declining enrollment.² The seriousness of the problem was discussed as were some positive effects of declining enrollment. The report presented an overview of planning needs, estimation of decline, public relation needs, cutting costs, use of empty space, closing schools, and reduction in force.

Projection of School Enrollment

A number of authors deal extensively with the topic of enrollment forecasting. Notable among these authors are Phillip Piele and Darrell Wright, "Enrollment Forecasting." Piele and Wright provide a brief introduction to the field and then present an annotated bibliography of 28 major documents covering the full range of attitudes toward enrollment forecasting. Piele and Wright described groups interested in forecasting as decision makers and model makers. School administrators were

¹ Ibid., 15-18.

² National School Boards Association Research Department, Declining Enrollment (Evanston, Illinois: NASB, 1976), pp. 1-28.

described from the perspective of decision makers while mathematicians, statisticians and demographers as model makers. Basic attributes essential if forecasts are to be accurate include: 1) the user must know the community and its uniqueness, 2) the user should apply a forecasting model regularly and often, and 3) the user must consider accepting probabilities as effective results.¹

Stanton Leggett devised a method of data collection for enrollment prediction for the American School Board Association. The method is based upon a systematic eight step process and utilizes the Cohort Survival Method and grade by grade calculations. A sample chart and an explanation of the information appeared in the January 1973, American School Board Journal. Leggett recommended omitting kindergarten estimates from the predictions and basing data collection upon the use of six week enrollment figures.

Numerous methods of predicting enrollment decline are printed in the literature. William Keough recommended awareness of a few informal signals to determine the severity of decline. He suggested administrators be aware of the answers to questions including:

Has there been a noticeable decrease in elementary school class size, from about thirty to an average of twenty?
 Has it been a few years since the stage, cafeteria or corridors were used for classroom space? Has the number of students at each grade level been declining as that class moves through school? Are principals' requests for libraries and media centers beginning to reflect actual or

¹ Phillip Piele and Darrell Wright. Enrollment Forecasting (Columbus, Ohio: ERIC Document Reproduction Service, ED 117 782, 1976), p. 4.

anticipated empty classrooms? Have special needs teachers been relocated from broom closets, cloak rooms and basements to full-size classrooms?¹

If the answers to many of the questions are positive, Dr. Keough has advised that school administrators begin immediately to develop formal methods of anticipating future school enrollment.

Some researchers have presented evidence that school administrators have ignored fluctuating enrollment trends. Dr. Mark Rodekohr of the University of Colorado studied the adjustments and reactions of Colorado school districts to declining enrollments. He found that many superintendents in districts with declining enrollments were unaware of the decline, or denied it.²

The difficulties in assuming the responsibility of long-range planning in the schools has been specifically addressed by the State of Wisconsin. Roger Lowney, Superintendent of the Merrill Public Schools, commented upon the log of public schools to develop long-range planning mechanisms. His reactions pertained to 1975 Wisconsin State educational statutes addressing the need for and application of educational planning. Superintendent Lowney stated:

Many school districts are operating without adequate planning to accommodate the ever changing demands of contemporary society. A great number of school districts operate on a

¹ William F. Keough Jr., "Early Warning Signs of an Enrollment Drop," School Management 18 (August/September): 42.

² Mark Rodekohr, "Top School Officials Will Find Good Ways to Grow Smaller," Education Daily 7 (October 1974): 2.

crisis-oriented policy. This statement is neither complimentary nor pejorative. It is a real world reality.¹

The Demographic Background to Changing Enrollment and School Needs by Davis and Lewis reviewed in detail the projected changes in population trends and school enrollments for the United States 1974-1980. The parameters and dynamics of population change were examined, and the population projections of the United State Bureau of Census were reviewed in detail. The expected geographic distribution of projected population was analyzed, and shifts in school enrollments were projected on the basis of expected demographic trends. The authors concluded that elementary enrollment will continue to fall until 1982. Beyond 1982 and until 1990 elementary enrollment will begin rising. They predicted an enrollment increase of 4.4 million between the projected low enrollment of 1982 and the projection period ending in 1990 but that the enrollment of 1990 will still be 4.8 million less than the peak enrollment of 1969.² A slight change was projected in racial structure of the population with non-whites increasing slightly relative to whites. An increase in migration to rural areas surrounding small cities has been projected as well as has been a leveling out migration from major cities to suburban areas. Regional and inter-state population shifts have been predicted noting Florida, Arizona, Nevada and Alaska as rapidly growing states and New York, Rhode Island, Pennsylvania, and Illinois as states

¹ Roger Lowney, "The School Agenda," Wisconsin School News 30 (December 1975): 1.

² Russel G. Davis and Gary M. Lewis. The Demographic Background to Changing Enrollments and School Needs (Cambridge, Mass.: ERIC Document Reproduction Service, ED 122415, 1976), p. 35.

with slow or declining growth.¹ Finally, continued participation of women in the work force may alter projections somewhat in that education may have to reach out earlier and more directly into the homes.

A K-12 enrollment upturn has also been predicted in the mid-eighties according to statistics made available by the National Center for Educational Statistics. Frankel's projections have been made through 1985 and report a total public and non-public enrollment of 46,058,000 students as compared to a projected low point of 45,340,000 anticipated in 1983.²

Katherine Eisenberger in a discussion paper, "Issues in Enrollment Decline Within New York State" stated some common characteristics experiencing declining enrollment. Some characteristics include:

. . . they are the communities that were first to be settled on the perimeters of the city; they are basically affluent areas where rapid increases in the value of the land have made the prices of homes inaccessible to young couples. They are communities located between urban areas and new suburbs, where little land is available for new construction. Because of the small number of young couples financially able to enter the area, they are communities whose children are rapidly approaching high school graduation.³

Sammie L. Banks in a dissertation presented to the University of Arkansas concluded that the state-local method of long-range enrollment forecasting is a logical and comprehensive method. Naturally, Banks

¹ Ibid., p. 37.

² Martin Frankel, "NCES Projects K-12 Enrollment Upturn to Begin in 1984," Phi Delta Kappan 58 (May 1977): 714.

³ Katherine E. Eisenberger, "Issues in Enrollment Decline Within New York State," paper presented to the NYSCSDA Mid-Winter Conference, New York, February 1974.

cautioned that the more the local parish resembled the state in mobility analysis and census date, the more valuable a state-local method of projection especially for short and medium range projections.¹

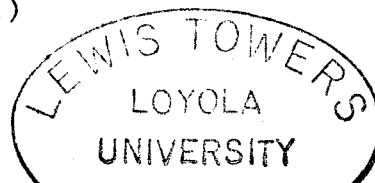
In a study by the Minnesota State Demographer's Office in 1974, nearly sixty percent of the state's school districts showed declining enrollment. The report indicated that although enrollments declined because fewer children entered school each year, the effect of out-migration was often more significant in explaining enrollment change. The author indicated that on a map of Minnesota one could see that areas of decline are often adjacent to areas of increase. Accordingly, the Minnesota report emphasized local planning:

. . . the annual record of resident births provides a five-year horizon for total enrollment planning, but may have little to contribute in ascertaining how the products of those births will be distributed during their school years. Research should be directed toward developing methods for local officials to accurately assess the future needs of their system based upon the community's ability to attract and hold young families.²

The Minnesota study concluded that although district size may be a factor in the ability to cope with the stress induced by a large numerical change in enrollment, if it varies by ten percent or more it will very likely cause some adjustment pains. Not all those pains referred to are directly related to costs; consequently, large metropolitan systems must also face problems which are peculiar to their

¹ Sammie J. Banks, "The Application of a State-Local Method of Long-Range Enrollment Projection for the State of Louisiana and Caddo Parish" (Ed. D. dissertation, University of Arkansas, 1976), pp. 92-102.

² Office of the State Demographer, Development Planning Division, Minnesota State Planning Agency, "An Analysis of School Enrollments 1970-74," St. Paul, 1975. (Mimeographed.)



social settings.

The Educational Research Service conducted a comprehensive survey entitled "Percent of Enrollment Changes, Fall 1971 to Fall 1974, and Per Pupil Expenditures for Current Operations in the 50 Largest School Systems." They concluded that it is probably the migration pattern rather than the decline in birth rate that accounts for the enrollment decline from the fall of 1971 to 1974 in the fifty largest school systems. Of these districts, seventy-two percent reported some decline between 1971 and 1974. Of districts reporting declines, eighty-nine percent reported a three percent or greater decline and sixty-seven percent reported a seven percent or greater decline. Twenty-four of the fifty largest systems declined by seven percent or more in three years.¹

William M. Irvin, in a dissertation "A Study of Declining Student Population in North Carolina and its Implications for School Management," concluded findings that generally concurs with published demographic reports. Irvin's study revealed that decline was well established at the elementary level and that the decline was statewide in scope. He stressed the need for increased planning activities by school management.²

¹ "Percent of Enrollment Changes, Fall 1971 to Fall 1974, and Per Pupil Expenditures for Current Operations in the 50 Largest School Systems," Educational Research Service Bulletin 2 (February 1975): 4.

² William M. Irvin, "A Study of Declining Student Population in North Carolina and its Implications for School Management" (Ed. D. dissertation, Duke University, 1976), pp. 142-170.

Economics of Declining Enrollment

R. L. Andrews completed a survey of forty-nine school districts that had experienced significant enrollment decline prior to 1974. The results of his survey concluded that 33.3 percent of the school districts that had calculated annual cost savings after closure of elementary school buildings did in fact save money. On the other hand, fifty percent of those districts who had calculated actual costs concluded that no money had been saved by the closure of schools. The lack of savings was attributed to increased transportation costs, reduced school support, increased crime rate, decreased property values, and disruption of elementary programs. The remaining 16.7 percent indicated that the closure had cost the district more money. Thus, 66.7 percent of the school districts which had evaluated the effects of closure came to the conclusion that they had saved no money or that closures were costing the district more money. Correspondingly, 33.3 percent concluded that they had saved money from the closures but it was less than had been projected before the schools were closed.¹

The Eugene Public Schools' Board of Education appointed a task force in Spring 1975 to complete a comprehensive study related to all aspects of possible closure of small schools. The Task Force completed a final report in February 1976. The Task Force concluded that

¹R. L. Andrews, et al, "The Environmental Impact of School Closures," University of Washington, 23 August 1974. p. 23-27.

per pupil costs in the smaller schools, populations of 129 to 246 students, was about ten percent greater than per pupil cost of the larger schools, populations 265 to 625 students. The annual savings of closing but not disposing of an elementary school and relocating the students varies from 17,000 to 50,000 dollars per year.¹ Age of itself was not regarded as a valid criterion for abandonment of a school building. The Task Force did not find any major conflict between traditional architectural spaces and innovative programs. They concluded that whenever enrollment at any school dropped below seventy-five percent of program capacity, a committee made up of representatives from that school's attendance area, from the community at large, and from the school district should be appointed to determine the best use of all parts of that school. The Task Force estimated that the upkeep of temporarily closed buildings would be approximately twenty percent of the normal costs.² It was further concluded that the elementary schools represent the central feature of most residential communities, and a lack of such facilities can have a significant effect upon reducing the value and livability of an area.

While property values may go down in declining enrollment communities, school tax rates may increase. Norman Poynter in his dissertation presented to Miami University in 1976 concluded that the school tax rate for declining enrollment districts in the State of

¹ Eugene Public Schools, "Small Schools Task Force Final Report" Eugene, Oregon 1976, p. 3. (Mimeographed.)

² Ibid., p. 19.

Iowa was somewhat above the mean for non-declining enrollment districts. The study was based upon data through the 1974-75 school year.¹

According to the Montgomery County, Maryland, Task Force on Small Schools, ". . . a school with about 200 students will cost, on the average, twenty percent more per student than a school with 300 students and twenty-five percent more than a school with 500-600 students."² The Task Force indicated that the high cost of operating good schools in small districts can only become greater as enrollment declines, shrinking both the numbers of students over which costs are averaged and the base for state appropriations. A major part of the financial inefficiency of small districts is the cost of manpower. In the Montgomery County Report, two-thirds of the increased cost of small schools was attributed to professional staff. Classes in small schools are generally smaller than in large schools, and while that may be beneficial for some programs, there are also instances where it is merely inefficient. The Montgomery Task Force further concluded that ". . . the second major factor accounting for the increased cost of small schools is the added costs of other staff: secretaries, aides, and building service employees."³

¹ Norman C. Poynter, "The Effects of Declining Enrollment on Staff Redeployment and Building Utilization in Ohio Public School Districts" (Ph. D. dissertation, Miami University, 1976), pp. 130-144.

² Montgomery County Public Schools, "Report of the Small Schools Task Force." Rockville, Maryland, 1973. (Mimeographed.)

³ Ibid.

Les Chapdelaine conducted a survey of public opinion to determine how the public would resolve the fiscal issue. Chapdelaine in his dissertation, "Public Opinion Toward Education: Declining Enrollment and a Shifting Economy," concluded that respondents preferred cutting administrative positions and holding down salaries for all personnel as a preferred method of controlling school costs. His survey further reported a preference for a return to basics as well as increasing vocational offerings.¹ The dissertation was presented to Columbia University Teachers College in 1977.

Facility Closings

Avoiding misunderstandings among certain elements in the community is almost impossible according to Katherine Eisenberger especially when the issue is closing of neighborhood schools. Eisenberger reviewed five general techniques available that could help alleviate public turmoil. The techniques include:

- 1) Channel communication throughout the community and within the school administration.
- 2) Gather ample information within the school district.
- 3) Use varied techniques to ease tensions including student and parent visitation programs and joint member meetings of school organizations.
- 4) Involve the community directly through public meetings, polls and questionnaires.
- 5) Spread the word many ways through carefully selected media.²

¹ Les G. Chapdelaine, "Public Opinion Toward Education: Declining Enrollment and a Shifting Economy" (Ed. D. dissertation, Columbia University Teachers College, 1977), pp. 256-258.

² Katherine E. Eisenberger, "How to Prepare the Public for the Closing of a Neighborhood School," The American School Board Journal 162 (June 1975): 42-44.

Eisenberger reminds her readers that during the past twenty years American education has coped with many problems, and those surrounding declining enrollment will also be resolved.

John F. Faust of the University of Cincinnati analyzed school closings in Cincinnati in a dissertation presented in 1976. Dr. Faust completed a case study of two school closings to determine the social and political attitudes affecting the closings. He learned that in both cases the principals and communities became aware of the proposed school closing through information leaks from the central office. The following recommendations were made to guide decision makers considering the closing of schools:

- 1) A comprehensive collection of data concerning each school should be compiled and a school should be considered for closing only if such action is supported by the data.
- 2) School principals who will be affected by the closings should be involved in the decision from the start of the data collection stage.
- 3) The affected communities should be involved before any decisions are reached about specific schools that are to be closed.
- 4) Involvement should encompass a broader "community" than that served by one school whenever possible.
- 5) All of the information that is relevant to the decision should be available to all the participants in the decision process.
- 6) Sufficient time should be allowed for a careful study of the problem and the development of possible solutions.
- 7) Some kind of improvement in the educational opportunities of the pupils should be offered as an incentive to parents to accept the loss of their school.
- 8) The emotional nature of a school closing should be recognized and the decision process conducted with understanding.
- 9) Consideration should be given by the Board to the recommendations that result from the involvement of the community.
- 10) There should be no equivocation by the Board of its decision.¹

¹John F. Faust, "The Social and Political Factors Affecting the Closing of Schools in a Period of Declining Enrollments in a Large Urban School System" (Ed. D. dissertation, University of Cincinnati, 1976), pp. 202-207.

The article, "A Case Study How One District is Closing a High School," appeared in the NASSP Bulletin, March 1977. The authors, principals in Skokie, Illinois, discussed a suburban district that experienced continued growth from its inception and the sudden spector of declining enrollment which required a complete turn-about in attitudes and techniques. How the school board and its administrators are handling the situation is described in detail:

Committees formed, tasks assigned and members appointed are all carefully spelled out. In 1975 the school board determined that by 1980 one of the three high schools serving the community would no longer be necessary. Extensive committees have been formed to plan for that closing. Committees formed include those dealing with student articulation, certified staff articulation, classified staff articulation, distribution/disposal of furniture, equipment and awards at Niles East and disposition of library collection at Niles East.¹

The need for planning so far in advance of the actual closing date of the facility is cited as essential if the school district is to maintain a commitment for high quality education.

Superintendent Peckenpugh discussed the activities used in Birmingham, Michigan, to close a junior high school. In addition to guidelines, the author summarized concerns and problems of the administrators who were involved in Birmingham. He noted that the problems connected with the closing of the school are many but comments that with adequate planning, the frustrations of staff, school board, and community may be lessened. The need for staff, student, and parent

¹Galen Hosler and Gilbert R. Weddy, "A Case Study How One School District Is Closing a High School," NASSP Bulletin 61 (March 1977): 45.

orientation programs is stressed as is a general public information program designed to keep the community well informed of efforts and activities of the school board and of the various committees. In addition to the somewhat typical suggestions presented by many authors, Superintendent Peckenpaugh also discusses helpful hints associated with transportation changes, division of equipment of a closed school, disposition of business account records, disposition of student records, physical movement of equipment, furniture, books, and instructional materials. Regarding the closing of the school building, some helpful hints are made especially aimed at limiting vandalism and destruction. He commented:

Oftentimes unthinking actions by staff can lead students to vandalism. A year-end ceremony can foster positive attitudes. Picking up all the litter and removal of all property is crucial in order to encourage citizens to maintain respect for the facility.¹

Schools cannot be operated in a financially sound manner while operating at sixty to seventy percent capacity. Katherine Eisenberger stressed this fact and cautions administrators to recognize that superintendents have been dismissed because they viewed the issues as a "nuts and bolts" problem instead of a people problem. She noted that there is no such person as a loyal district supporter; there are only loyal school supporters.² She commented that while administrators and

¹ Donald Peckenpaugh, "Closing a School? What the Principal Must Consider," NASSP Bulletin 61 (March 1977): 26.

² Katherine E. Eisenberger, "Closing a School: Some Ways to Ease the Trauma," School Management 18 (August/September 1974): 33.

boards rationally and logically deliberate over costs, contracts, tenure laws, and other managerial issues, psychological-emotional concerns may become the most volatile concerns within the community. Techniques to reduce such concerns include use of community polls, coffee hours, in-school visits, and the establishment of a task force composed of a cross section of community.¹

The literature repeatedly recommends the use of a community task force in dealing with the problems associated with enrollment decline. The Task Force for the Highline School District, Seattle, Washington, was somewhat unique in that it was headed by a salaried project facilitator. The twenty-four members were appointed from the community. The purpose of the Task Force was to:

- 1) establish criteria for identifying facilities where changes should be considered;
- 2) identify and prioritize alternatives for use of excess classroom space; and
- 3) determine a process for involving the community in the development of awareness, understanding and for providing input prior to making changes in schools because of enrollment decline.²

The Highline Task Force divided the investigation and planning process into phases. Each phase was identified by time, purpose, methods, and special concerns.

There are many school systems that have decided that curriculum enrichment is an economically beneficial method of reacting to declining enrollment. William Haessig, Director of the Division of Educational

¹ Ibid., pp. 34-35.

² Highline School District "Report of the Task Force on Declining Enrollment," Seattle, 1974. (Mimeographed.)

Facilities Planning for New York, recalled some of the changes made in schools with decreased enrollment:

Teachers with over thirty children to a class ten years ago now have breathing room. There are opportunities for extra services and options that couldn't take place with schools filled to the brim as before. The extra space is being turned into separate art and music rooms, libraries and resource areas and classes for the handicapped. They're using the space to better serve the children. Now there are provisions for full day classes. Some math labs and science labs have been created where students can be sent to do independent work or work with a teacher aide. This is leading to possibilities for individualizing and more imaginative use of space.¹

Peter Green in an EFL Newsletter, "Schoolhouse," cited examples of expanded district programs. Fairlington School served an area of Arlington, Virginia. In 1973 the school population decreased from 440 pupils to about 225. A local play school was invited to move into the school. In short order a community recreation department, a senior citizens group, and a community theater group also moved into the building. As a result of making the school indispensable to the community, Fairlington was no longer threatened with closing. The money to support non-school programs come from non-school sources such as community service funds. The Hoffman-Boston High School was presented as an educational facility and at the same time as a community center.²

Staffing Issues

William F. Keough Jr. has offered several suggestions to prepare

¹ William Haessig, "Learning to Live with Contraction." Inside Education 60 (May 1974): 3.

² Peter Green, ed., "Community Programs Occupy Empty School Spaces in Virginia," Schoolhouse 21 (September 1975): 1-8.

for staff cutbacks including: placing a moratorium on teacher leave policies, offering one or two-year termination contracts to new teachers, instituting studies to estimate attrition and retirement openings, and introducing an early retirement incentive program. Keough cautioned management to plan for a different sort of emphasis in negotiations--away from salary item to job security issues.¹ He further discussed a series of points which Boards of Education may wish to include in reduction in force policies. These statements usually cover such points as:

- 1) provisions for paring expenses to the bone before RIF of full-time personnel is considered;
- 2) dates of notification to individuals who will be affected;
- 3) stipulations for the order in which layoffs will occur; for example, nontenured, quality of service, and so on;
- 4) provisos for preferential considerations for substitute teaching positions;
- 5) conditions for preferential consideration in rehiring periods;
- 6) provisions for definition of employee status;
- 7) arrangements for retraining or reassignment.²

In a 1973 study by Educational Research Service, the impact of declining enrollment on small districts and the relatively greater flexibility of large districts was extensively treated. The report, "Enrollment Trends and Staff Reductions," concluded that over one-third of school districts of 300 students or more had some staff reduction in 1972-73; sixty-seven percent of those districts surveyed reported that declining enrollment was the chief reason. The report showed that large

¹William F. Keough Jr., "How to Make the Best of Your School District's Enrollment Slide," The American School Board Journal 162 (June 1975): 41.

²Ibid.

and medium districts can and do cut heavily in administrative, supervisory and special service areas; small districts, already limited of such personnel, must cut almost exclusively from the teacher ranks.¹

M. Chester Nolte advised to use the "Three F" test to avoid repercussions in lay off of teaching staff. Nolte indicated that the best rating system for evaluating personnel was one that entails subjective application of objective measures. While some subjectivity is allowable by the Supreme Court, a district must be able to demonstrate that evaluation is not arbitrary or capricious.² Any form of assessment that displays a pattern of discrimination is in definite violation of due process. Nolte indicated that it was possible to develop a sound evaluation system around the performance criteria implied in the teacher characteristics associated with firmness, fairness, and friendliness. He described firmness as consistent, predictable, and pre-advertised behavior so that children are certain of limits. Friendliness is a quality determined by watching for its absence rather than its presence. Fairness has been described by the court in that no person shall be condemned unheard and that every judge shall be free from bias.³ Nolte said that by applying the "Three F" test chances of court cases are diminished, budgets could be reduced, and that perhaps

¹ "Enrollment Trends and Staff Reductions," Educational Research Service Research Memo, November 1974, p. 2.

² M. Chester Nolte, "How to Tell Which Teachers to Keep and Which to Lay Off," The American School Board Journal 162 (June 1976), 23.

³ Ibid., 29.

the lot of children could be improved.

Reduction in force can never be made easy, but it can be made workable if careful plans are developed before reduction is needed. This theme was the focal point of "A Sane Approach to Staff Reduction" by Raymond Schultz. He outlines a series of steps that might provide a basis for reduction as follows: 1) maintain up-to-date projections as to where reductions will be necessary, 2) pinpoint areas where over-staffing and understaffing exist or seem probable, 3) reduce nonsalary expenditures, 4) encourage voluntary reduction through voluntary leaves and early retirement plans, 5) consider termination of nontenured full-time staff with the least service, 6) consider termination of non-tenured and part-time staff, 7) terminate tenure staff, 8) formulate due process procedures, help terminated staff obtain other employment, and 9) place terminated staff on furlough.¹ He suggested the concept of furlough for up to three years with provisions to purchase health plans, retirement plans, and other institutional fringe benefits.

The problems of declining enrollment have presented concerns for Canadians at least as early as for West Coast districts in the United States. Peter Coleman presented a paper, "School Division Planning in an Era of Declining Enrollments," to the Manitoba Association of School Trustees in 1973.² The paper proposed that a more flexible approach

¹Raymond E. Schultz, "A Sane Approach to Staff Reduction," Community College Review 3 (January 1976), 8-11.

²Peter Coleman. School Division Planning in an Era of Declining Enrollments (Winnipeg, Manitoba: ERIC Document Reproduction Service, ED 075 924, 1973) pp. 4-11.

to the development of teaching groups, accompanied by the necessary changes in staff and facility utilization, would help solve problems arising from declining enrollments in elementary schools. Such problems were present in many elementary schools in Western Canada. The problems of educational planners in dealing with declining enrollments were examined in terms of school organization, staff utilization, and the utilization of facilities. Proposals especially appropriate for elementary schools with less than 150 students in eight grades were illustrated in four models for classroom grouping. Two models assumed that teachers could develop teachable groups and a variety of activities that students could benefit from extensive individualization of curriculums and changeable groupings and that school facilities could be modified to allow for a variety of groupings. Two other models were more traditional, suitable for schools whose physical structures were not easily changed. Coleman stated that implementation of the proposals could improve the quality of education in areas of declining enrollment, while keeping costs down.

School systems repeatedly point out to teacher trainers that while applicants meet minimum state certification requirements, they still do not meet the standards of many school systems according to Dean Corrigan, Dean of the College of Education, University of Vermont. Corrigan reported that although statistics report teacher surplus, there exists a severe shortage of teachers capable of creating a new kind of tomorrow. Education for tomorrow includes need for environmental education, bilingual and cultural studies, adult education, and vocational-technical teachers.

"The current pronouncements of a teacher surplus are not based upon the true needs of children and youth in 1974 . . . the present financial crisis in education not only indicates a lack of confidence in schools; it may signal a more devastating condition: thousands of Americans may be losing faith in the future."¹

According to Corrigan, schools require a vastly wider variety of personnel including research associates, learning diagnosticians, visual literacy specialists, system analysis and evaluation experts, specialists in simulation and gaming techniques, information systems and data base designers, and community education teachers.

Wilma Davidson and Susan Kline discussed job sharing as a unique vocational response to the needs of women. Their article, "How to Get Two Experienced Teachers--For the Price of One" was printed in The American School Board Journal, September 1977.² Job sharing provides the opportunity for persons to remain partially involved in the profession while meeting the demands of other components of their life. The objections by teacher organizations and administrators were discussed.

William A. Kritsonis completed a dissertation at the University of Iowa in which he reviewed supreme court and district court rulings regarding nonrenewal of personnel contracts for reasons of declining enrollment or economic stress. He noted that of thirty-eight court

¹ Dean C. Corrigan, "Do We Have a Teacher Surplus?," The Journal of Teacher Education 25 (Fall 1974): 197.

² Wilma Davidson and Susan Kline, "How to Get Two Experienced Teachers--For the Price of One," The American School Board Journal 164 (September 1977): 35-36.

cases, fifteen of them occurred in Pennsylvania and Iowa and none in the thirty-three other states. He cited three basic conclusions from the data:

- 1) Boards should be prepared to defend the reasons given for nonrenewal of employee contracts and should be aware that the burden is placed on the Board to sustain the reasons which are given for dismissal.
- 2) It is a fact that employees protected by a teachers' tenure act and seniority provisions have definite guaranteed employment advantages over those not protected by tenure. From the standpoint of employed teachers, their organizations would be well advised to strive to develop tenure laws for the protection of public school professional personnel.
- 3) Greater consistency from state to state is needed if Boards are to function with maximum efficiency and all teachers are to receive equal treatment under the law.¹

Oakville, Mississippi, district established a set of criteria as to which teachers would be dismissed resultant from enrollment decline. The system decided to cut driver education since it would do least damage to the academic program. If further cuts were required, teachers with the shortest term of tenure would be released first. Ultimately, two tenured teachers were no longer needed in one of the district schools. The teachers were released and subsequently brought suit against the school district. A Mississippi Federal Court ruled that a reasonable decision had been made in discontinuing driver education. The court did rule that tenure status must be determined on a district wide basis and not a building basis and that a tenured staff person

¹William A. Kritsonis, "A Study of Selected State Supreme and District Court Decisions on the Renewal of Public School Professional Personnel Contracts for Reasons of Declining Enrollment or Economic Stress in Accordance with the Due Process of Law" (Ph. D. dissertation, University of Iowa, 1977), p. 301.

must be offered any vacancy for which qualified as soon as such a vacancy occurred.¹

In his dissertation, "Declining Enrollment--Policies and Procedures Involved in Reassigning Administrators," James Seitz noted that a majority of the districts studied utilized a competency or performance type evaluation system to make administrative reassignments. He concluded, however, that there seemed to be considerable reluctance to commit these non-seniority type procedures to written form.² The study was presented to the University of Southern California in 1976.

Few articles appear regarding the redirection which will be required of management during periods of enrollment decline. Katherine Eisenberger indicated that managing decline rather than growth in the years ahead will require school administrators to have entirely new skill techniques. She described the creative approaches that new leadership will have to have in order to deal with effective curriculum changes. The author indicated that during a period of declining enrollment management demands a keener sense of balance and proportion in the allocation of scarce resources, a deeper understanding of human behavior, and a greater awareness of priorities for the future. In growth, the passage of time tends to balance errors of judgment in

¹"Financial Crunch Hits School System. What Happens When Tenured Teachers Must Be Fired." Your School and the Law 5 (May 1976): 4.

²James F. Seitz, "Declining Enrollment--Policies and Procedures Involved in Reassigning Administrators" (Ed. D. dissertation, University of Southern California, 1976), pp. 140-142.

resource and allocation; in declining, time compounds them.¹ She stressed the implication for curriculum including the necessity to provide a program and a delivery system that insures basic skills acquisitions; the challenge of designing a course of studies that will prepare today's students for living most of their lives in the next century, with available options for mid-career retraining opportunities; and opening up the high school to learners of all ages.

Surplus Space

It is quite understandable that the first thought of a school district confronted with surplus space would be to rid itself of the building and to attain subsequent budget relief. The literature supports the concept that once the sense of crisis surrounding enrollment decline has passed, school districts and their communities are finding solutions that increase the stability of neighborhoods by enriching services to people of all ages. It is reported that closed schools may in fact serve to reverse a trend of people to move away from a community by providing a physical resource in which to house programs that can help hold people who might otherwise choose to leave.² The literature discusses options, some of which may strengthen a total community and in the end become a source of resurgence to a community.

¹ Katherine E. Eisenberger, "New Leadership Skills Declining Enrollment: Implications for the School Curriculum," NASSP Bulletin 61 (March 1977): 48.

² Educational Facilities Laboratories, Surplus School Space: Options & Opportunities (New York : [EFL, 1976]), p. 51.

Surplus School Space: Options & Opportunities, a report from the Education Facilities Laboratories is a reference addressed primarily to an audience made up of members of the communities at large. EFL researchers comment that:

"By now it is clear that the communities and school districts that are finding workable and acceptable solutions tend to be those in which there has been the broadest involvement of concerned citizens."¹

The publication discussed a variety of options to a community regarding either partial use of a school building that may continue to house public school children as well as partial or total use of a school building that has been abandoned for public school use. The following is a summary of the first choices to consider when space becomes available:

- 1) Provide an opportunity to eliminate inefficient, badly located, or otherwise undesirable school buildings.
- 2) Provide an opportunity to reassign programs and services previously inadequately assigned.
- 3) Provide for expansion of libraries, fine or practical arts program or other instructional programs.
- 4) Provide space for specialists who have been added to staffs.²

Closing schools or converting them to other use is a difficult decision. Most communities are reluctant to want to give up their school buildings yet are often equally reluctant to pay the costs of keeping buildings open which are inefficiently used. EFL researchers suggest further options for surplus space including the following:

¹Ibid., p. 5.

²Ibid., p. 7.

- 1) Inventory public and nonprofit organizations regarding their unmet needs.
- 2) Explore creation of a nonprofit agency to take over school buildings and manage human services centers and programs.
- 3) Analyze rental or lease of a wing or floor to a compatible public or nonprofit agency.
- 4) Consider redeployment temporarily to hedge against a day when space may again be needed for schooling.
- 5) Surplus schoolhouses, or portions of schools, make ideal bases from which to run the variety of programs that fall within the province of community education.
- 6) Adult and school programs in career and vocational education centers require significant per person area, a space demand which could be met by moving into vacant school buildings.
- 7) Comprehensive planning may reveal some ways to meet the reverse order program needs of colleges, high schools and middle schools since elementary schools are usually the first to meet the impact of enrollment decline.
- 8) Consider recycling abandoned schools as components of a de-segregation program.¹

Obviously, a list of specific applicants for use of available space could go on and on. The authors list school districts throughout the United States and Canada that have found alternate uses for school buildings.

Numerous EFL publications offer extensive details regarding the use of surplus space for specific purposes. Arts and the Handicapped: An Issue of Access, gives over 150 examples of how art programs and facilities have been made accessible to the handicapped.² A great variety of programs are included from tactile museums to halls for performing arts, and for all handicaps. The Arts in Found Places provides an extensive review of where and how the arts are finding

¹ Ibid., p. 8-10.

² Educational Facilities Laboratories, Arts and the Handicapped: An Issue of Access (New York: Educational Facilities Laboratories, Inc., 1976), pp. 16-20.

homes in recycled buildings, and in the process often upgrades urban centers and neighborhoods.¹ Over 200 examples, with special emphasis on things to do and not to do, are discussed. Community/School: Sharing the Space and the Action tells how schools share facilities with other public agencies to provide improved social services.² The book discusses financing, planning remodeling, staffing, and operating community schools.

In his dissertation, "Reutilization of School Facilities as a Result of Pupil Enrollment Decline," Andrew Fox studied the uses made of forty-one schools closed in Los Angeles County. He concluded that most districts should have closed schools a year earlier than they did, that most closed schools were reutilized for other educational programs, that schools were converted to income generating uses, and that districts saved approximately 100,000 dollars in personnel and support services for each school closed.³ The sale of schools ranged from 300,000 to 977,000 dollars while the mean annual lease income was approximately 43,000 dollars.⁴

In the article, "Declining Enrollment and Options for Unused

¹ Idem, The Arts in Found Places (New York: Educational Facilities Laboratories, Inc., 1976), pp. 1-18.

² Idem, Community/School: Sharing the Space and the Action (New York: Educational Facilities Laboratories, Inc., 1973), pp. 1-48.

³ Andrew J. Fox, "Reutilization of School Facilities as a Result of Pupil Enrollment Decline" (Ed. D. dissertation, University of Southern California, 1975), pp. 97-98.

⁴ Ibid., p. 47.

Space," Mr. Gores suggested many of the repeatedly suggested uses for unused space and cites some specific uses made by school districts throughout the United States for their unused buildings. He cautioned that there is no guarantee that the birth rate will not soon reverse its downward trend. He suggested that prudent public policy would be to hang on to school buildings and to fill them with compatible constituencies as the conventional students diminish in number.¹ He stressed the need to find uses that will strengthen community organizations. He urged persons involved in declining enrollment to employ a director of community services to coordinate a plan for community use of school facilities. Funds for the employment of staff are available from special federal government programs as well as from foundations such as from the Rockefeller Family Fund which is currently supporting a clearing house for problems of declining enrollment, directed by William Keough, Superintendent of Schools for Bedford, Massachusetts. The service is located at the Merimac Education Center, Chelmsford, Massachusetts.

In a recent NASSP Bulletin, Superintendent Savitt discussed how school districts use surplus buildings and indicated that use depended very much upon the local communities. The author urged several alternative uses available to school systems, commenting about the value and lack of value of each. The author's experiences were based upon closing

¹Harold B. Gores, "Declining Enrollment and Options for Unused Space," NASSP Bulletin 60 (May 1976): 96.

of schools in Plainview, New York. The alternatives discussed by the author included lease of school, sale of school, and moth-balling schools. He emphasized the need to ask citizens what they would like to have done with extra schools. The author stresses the need for long range planning indicating that no sharp upturn in enrollment was predicted by any recognized authority. Some innovative alternate uses for surplus schools discussed included: sale and conversion into apartments; housing for the elderly; diversified shopping center development; use by governmental agencies.¹

Pack and Weiss listed a variety of uses for surplus space from the somewhat traditional suggestions associated with program modification and adjustment or use by various members of the community to some more creative suggestions including redesigning to accommodate stores, boutiques, or college dormitories. The legal and practical issues were stressed as concerns for local school districts.²

Summary

The following summary of related literature has been presented to emphasize some of the major contributions addressed by the literature regarding the significant problems associated with declining enrollment.

The literature repeatedly affirmed the routine need for imple-

¹ Robert Smith, "Examine the Options for Utilization of Surplus School Buildings," NASSP Bulletin 61 (March 1977): 35-38.

² Kenneth Pack and Edmond H. Weiss, "And Specifically, How to Make Productive Use Out of All That Yawning Space," The American School Board Journal 162 (June 1975): 44-45.

mentation of enrollment projection studies by school administrators. The cohort survival method has been successfully used as has the Keough Survey. Administrators need not rely solely upon formalized methods but should also be alert to the numerous informal signals associated with the declining enrollment syndrome. It has been further noted that some administrators have indicated little recognition of the signals of decline but moreover, some have refused to accept them. The literature has placed some support upon the concept of a state-local method of long-range planning as effective for enrollment forecasting. The most predominant causes reported for enrollment decline include reduced birth rate, changes in migration patterns, and continued participation of women in the work force.

The economics associated with enrollment decline have had a near devastating effect upon some school districts. Generally, it has been recognized that the costs of operating a small school, under 200 population, has become a luxury public education should no longer afford. The closing of schools should not arbitrarily be regarded as synonymous with reducing costs from preceeding years. One survey of forty-nine school districts indicated that 66.7 percent showed no savings or increased costs while 33.3 percent showed a savings, but less than projected before the schools were closed. Further studies have demonstrated that the lack of elementary schools in a community have adversely affected local real estate values.

Near unanimous support has appeared in the literature endorsing the appropriateness of sincerely involving members of the community in

the closing of facilities. Administrators are advised to conscientiously exert effort to keep the community informed and to maintain open lines of communication. The literature has noted that the closure of school buildings has been a highly emotionally charged issue and effective closing has required public support.

Reduction in force has been an issue regarded by the literature, as would be anticipated, as far more crucial to school personnel than to the public. Studies have indicated that the two preferred methods of determining staff reductions have been based upon performance criteria and tenure. The literature has indicated that larger districts cut special service areas first whereas smaller districts cut almost exclusively from teacher ranks. Job sharing has been advocated as one of the more unique reduction in force options. Boards of education have been encouraged to shift emphasis in negotiations to job security issues and away from salary items. The implementation of flexible teaching groups plus changes in staff and facility utilization have also been reviewed. Finally, the literature emphasized the fact that management for the future will require redirection during periods of decline. Leaders will need a new and broader range of skills in order to lead effectively and with a greater awareness of priorities for the future.

The literature appeared to express unity in the caution regarding the permanent disposal of empty buildings. It has been promoted that districts could reduce the trend of people to move from communities by providing programs within schools that would be particularly attractive to their specific needs and interests. A wide range of alternative

uses for schools have been enumerated. The use of a closed school was regarded as an area of critical concern to the residents of a community. It was stressed that the use of an empty school must be compatible with the self image that the community holds for itself.

CHAPTER III

THE RECONSTRUCTION OF THE DATA

Introduction

Chapter III provides an overview to the school districts in which the institutional case studies were completed. The statistical information contained within the Chapter has been drawn from documents constituting public record within each district or community. All quantitative facts referred to in this Introduction have been totally documented in Chapter IV.

The study was conducted in two elementary school districts in Cook County, Illinois. The school districts selected for study were most unique in that they represented the only school districts in Cook County that had closed three or more school buildings prior to September 1977 as a direct result of declining enrollment.

District 87 and District 25 reached peak enrollments in 1969 with enrollments of 3,345 and 10,060 students enrolled respectively. The combined tax rate in 1969 for District 87 was 2.364 and 2.895 for District 25. Prior to 1974, each school district had similar management options in that neither teacher organization contract addressed such major topics as reduction in force, teacher transfer and reassignment, or class size. The assessed valuation supporting each student in the 1971-72 school year, the year of the first school closing, was 36,296 dollars in District 87 and 20,466 dollars in District 25.

Arlington Heights District 25

Arlington Heights located Northwest of Chicago has been primarily a commuter community. Established as a small community in the early nineteenth century, Arlington Heights has developed into a dynamic and modern community with a population of over 70,000. The majority of the population growth occurred during the nineteen hundred and sixties. The growth and development of the community has been attributed to its proximity to Chicago, a convenient road and rail transportation system, and the general quality of life in the community. Although still largely dependent upon Chicago for its economic existence, Arlington Heights has, in the past decades, started to develop its own economic base as an entity separate from the Chicago growth base.

The Arlington Heights boundaries have expanded from less than 5.3 square miles in 1950 to its current area of 13.5 square miles. Residential housing including single-family, two-family multi-family dwellings has increased in the decades of the 1950's and 1960's. An increase of twenty-three percent occurred in building permits for single-family dwellings between 1950 and 1970. More dramatic, however, has been the increase of multi-family dwelling permits, which in the decade of the 1950's was 367 and in the 1960's 4,827--an increase of 1,215 percent. The dramatic population growth and land development of the past two decades has been reported to have leveled off and approximately ninety-five percent of the land space has been developed. Of the 201 suburban municipalities surrounding Chicago, Arlington Heights has risen

to a socio-economic rank of twentieth in 1977 as opposed to twenty-seventh in 1970 according to urbanologist, Pierre deVise. Also according to deVise, the median family income in 1977 was 29,900 dollars while the percent of families with incomes of 25,000 dollars residing within the community was 60.2 percent. The median home value was 64,400 dollars in 1977.¹ During the 1970's a decrease in the number of young families moving into the district has been noted. The work force within the community has been primarily composed of technical workers or white collar workers. In addition, the portion of families within the community who have children of high school and college ages has been steadily increasing.

The assessed valuation of School District 25 was approximately 203.7 million dollars in 1976-77. Four distinct taxing agencies are incorporated within District 25 including the William Rainey Harper College. The graduates of Arlington Heights District 25 attend Township High School 214 while a small number of students elect to attend Sacred Heart of Mary and St. Viator High Schools. Three other elementary school districts serve the community including Wheeling Township District 21, Prospect Heights District 23, and Community Consolidated District 59. In addition, one Lutheran and two Catholic schools have been organized to provide elementary education to community residents. Arlington Heights District 25 owns nineteen elementary school buildings

¹"How the Suburbs Rank in Income", Chicago Daily News, 27 September, 1977, p. 38.

and in September 1977 used sixteen of them to implement the instructional program of the public school.

The student body has been composed of students whose families have moved from Chicago or the greater metropolitan Chicago area as well as families who have moved from out of state to assume employment positions within the metropolitan community. District 25 reached a peak student enrollment in September 1969 when 10,060 students were enrolled. At that time, a certificated staff of 485 persons were employed. The maximum number of certificated personnel employed in the district was 493 persons in 1970. The student enrollment in September 1977 had declined to 6,756 students while certificated staff had been reduced to 401 persons.

Berkeley District 87

Berkeley School District 87 was founded in the mid-eighteenth century and was for many years a rural school district serving a typical mid-western American rural community of truck farmers.

During the 1920's, large numbers of Yugoslavians moved into the Bellwood area and founded a community and a parish. A small community in Berkeley made up the Berkeley-Hillside Presbyterian Church group. In what is now Northlake, there was a small community made up primarily of railroad workers. The land area was largely swampy and not readily suitable for development.

The communities composing the Berkeley School District remained relatively static in growth and development until after World War II.

Up until that time, the Riley School, Longfellow School, Jefferson School, and Sunnyside School served the area. After World War II, the Berkeley and Hillside communities were developed by a number of small contractors. Bellwood was developed by a large contracting firm which built moderately priced single-family homes and town houses. The Northlake area was developed by shell house builders, mobile home accommodations, and owner built homes.

Since the decline of the railroad system, much of the railroad property, which is the Proviso Freight Yard, has been developed industrially. Approximately ninety-five percent of the land within the Berkeley School District area has been developed for residential or industrial use. Within the next decade, it has been projected by local real estate firms that some of the post World War II homes may be cleared for industrial purposes.

The Berkeley School District currently serves residents of the Berkeley, Bellwood, Hillside, Northlake, Melrose Park, and Stone Park communities. Also, according to University of Illinois, Circle Campus Assistant Professor, Pierre deVise, the communities served by District 87 ranged in 1977 socio-economic ranking from seventy-first to one hundred and sixty-ninth as compared to the 201 suburban municipalities surrounding Chicago. All of the communities showed an increase in their socio-economic ranking as compared to 1970. The median family income within the communities ranges from 17,990 dollars to 23,640 dollars with Stone Park having 19.3 percent of the families with incomes over 25,000 dollars and Hillside having 48 percent of the families with

incomes of over 25,000 dollars. The median home values within the six communities range from 30,900 dollars to 39,900 dollars.¹

During the past decade, a declining general population trend has been noted and decline has been estimated at approximately three percent a year for the past five years. The work force within the community is composed primarily of laborers or blue collar workers. In addition, the portion of the community of retirement age, living on low to moderate fixed incomes, has been steadily increasing during recent years.

The assessed valuation of School District 87 was approximately 135.5 million dollars in 1976-77. Incorporated within the Berkeley District 87 school community are some eighteen different taxing agencies. The graduates of District 87 generally attend the Proviso Township High School, the Leyden Community High School, the Walther Lutheran High School, and to a lesser degree Immaculate Heart of Mary High School and St. Joseph High School. Elementary school districts overlapping communities served by District 87 includes Franklin Park District 83, Bellwood District 88, Maywood District 89, and Hillside District 93. In addition, each community has at least one Catholic elementary school while Melrose Park has numerous Catholic elementary schools and one Lutheran elementary school. Berkeley District 87 owns ten elementary schools and in September 1977 used six of the buildings to implement the instructional program for Berkeley public school children.

¹"How the Suburbs Rank in Income", Chicago Daily News, 27 September 1977, p. 38.

The student body has been made up largely of children of Southern European origins whose families have been long time residents of the community or who have moved from the City of Chicago. A small number of students have migrated from the Southern United States while within recent years a noticeable influx of Mexican, Puerto Rican, Cuban, and other Spanish speaking children have been enrolled in the District. Within the last three years, a few black families have moved into the community.

District 87 reached a peak student enrollment of 3,435 students in September 1969. At that time, a certificated staff of 168 persons were employed. Remarkably, the certificated staff continued to increase in numbers until 1973 when 180 persons were employed. The student enrollment in September 1977 had declined to 2,666 students and certificated staff had declined to 123 persons.

Observer Rating Tasks

The reconstruction of events presented in this chapter were submitted for ratings by two independent boards of expert observers.

One board of expert observers was composed of elementary school superintendents of school districts in Cook County, Illinois. The school districts for which the superintendents were chief executive officers ranged in size from 929 to 5,575 in reference to student enrollment and from 58 to 304 in terms of numbers of certificated personnel employed. In addition to the qualifications specified in Chapter I, three of the superintendents possessed doctoral degrees, one was a doctoral student, and another possessed a certificate of advanced

study.

The second board of expert observers was composed of chief executives from a broad spectrum of private enterprise. The current positions held by members of the management board included: 1) Secretary-Treasurer-Controller, Scholley Corporation, 2) Manager of Manufacturing, Bodine Electric, 3) Manager, Price Waterhouse & Co., 4) Sales Administrator of the Midwest Region, Mobil Chemical Company, and 5) Advisory Research and Development Engineer, Continental Can Company. All five observers were located in Northern Illinois.

The question that the expert boards of examiners were selected to resolve was whether the solutions arrived at by Districts 25 and 87 were attained in terms of a logical course of action rather than through chance. House, in his 1970 study of the innovative State of Illinois Gifted Program, posed the same question in terms of gifted program development. House used the Rogers' model of Collective Adoption of an Innovation and employed independent observers to rank a number of program activities to assist in the determination of logical problem solving behavior concerning gifted program development.¹

The specific observer rating tasks were:

1. Read the five stages of the Problem Solving Model.
2. Read the sixty events related to School District 25 and the sixty-four events related to School District 87. In the blank space

¹ Ernest R. House, et al., Advocacy in a Non-Rational System (CIRCE, University of Illinois, Urbana, Illinois, November 1970), pp. 1-7.

provided next to each of the items place a 1, 2, 3, 4, or 5 indicating that in your judgment the particular event best represented the number corresponding to one of the five steps in the problem solving model.

In the purpose of promoting objectivity, the district names were removed from the chronology of reconstructed events given to the boards of expert examiners and a designation of District A and District B was substituted. In a like manner, all proper names identifying the communities or individuals within the communities were deleted from the materials provided to the expert observers.

The Problem Solving Model

The problem solving model utilized in this study was selected because of its original design as a model for change oriented decision making. The model was initially presented at a leadership conference conducted by the Northwest Regional Laboratory in 1968.

The Model

Step 1--Identification of a concern: Who is causing it and who is affected by it? What specific goals would need to be attained in order for it to be resolved? What kind of a problem is it?

Step 2--Diagnosis of the situation: Once the problem has been clearly stated in terms of goals to be attained, it is necessary to push toward or against a particular goal. As the true forces are identified, goals which were first thought to represent a solution are viewed as incorrect or inadequate. New goals must be stated and new forces identified.

Step 3--Formulation of action alternatives: As diagnostic work pro-

gresses, a range of action alternatives should emerge. Each should be considered in relation to knowledge of the forces operating in the problem situation. If one or some combination of the alternatives is tried, what will happen to the forces pushing toward or away from a particular goal? How will the forces operate to influence the success or failure of a trial of a particular action alternative?

Step 4--Feasibility testing of selected alternatives, including training and evaluation:

At some point, one or a combination of the action alternatives will be attempted. As the attempt is made, information will be needed to assess whether there is movement toward the goals. Feasibility testing includes discovery of the forces which are changing to understand what is accounting for movement, or the lack of it. Feasibility testing includes an assessment which provides both an evaluation of progress and new diagnostic pictures. The evaluation of progress and the new diagnostic pictures clarify the next action steps which need to be taken. Finally, feasibility testing may identify additional skills which may be needed in order to move ahead.

Step 5--Adaptation and diffusion: Information gained from action experience in dealing with a problem should be shared with others who face similar problems. Information to be diffused should include: a clear, specific problem statement; the forces involved in the problem situation; a description of action taken to change the forces; results of action including failures as well as success; special problems that were encountered; and special skills that were needed to make it possible for persons in another setting to adapt elements of what was tried

to their own diagnosis of their particular problem situation.¹

Chronological Reconstruction of Events

The following events have been identified as the most significant that occurred during the decade preceding and during the school closings in Arlington Heights District 25 and Berkeley District 87 through October 1977. The events were identified by the following activities:

1. Extensive interviews with numerous District 25 personnel.²
2. Extensive interview with Berkeley School District 87 superintendent.³
3. Review of minutes of the school boards.
4. Review of teacher bargaining agreements.
5. Review of numerous official district documents and reports maintained in accord with the requirements of the State of Illinois.
6. Review of local newspaper articles.
7. Review of various district newsletters.
8. Review of memoranda of several citizens groups.
9. Review of administrative directives and guidelines.

¹"Research Utilization Problem Solving Model for Educational Change," Northwest Regional Laboratory, paper delivered at the Educational Training Consultants Leadership Conference, Bethel, Maine, June 1968. (Mimeographed.)

²Interview with Todd A. Fouty, Donald V. Strong, and Gerald Williams, Arlington Heights School District 25, Arlington Heights, Illinois, August-November 1977.

³Interview with Robert Poindexter, Berkeley School District 87, Berkeley, Illinois, August-November 1977.

Reconstructed Events - Arlington Heights District 25

1. September 1969 - District 25 reached a peak enrollment of 10,060 students. _____
2. March 1971-April 1971 - The administrative staff presented reports to the Board of Education indicating that the kindergarten through third grade classes in Dwyer School could be accommodated in another school on the same campus. _____
3. April 1971 - The Board of Education adopted a resolution to close Dwyer School effective June 1971, and to send students enrolled to Westgate School located on the same site. _____
4. May 1971 - The Board of Education approved an annual lease for the Dwyer School to the Northwest Special Education Cooperative. _____
5. September 1970-September 1971 - Enrollment decline noted by administration but previous period of rapid growth anticipated to resume some degree of former extraordinary growth rate. _____
6. May 1971-May 1973 - The personnel office conducted informal projection surveys as associated with determining staffing needs. _____
7. March 1972 - The foreign language program was cut effective September 1972-73. _____
8. May 1972-December 1973 - The central administrative staff began to study available research information pertaining to fiscal projections especially as relating to the consequences of student enrollment decrease. _____
9. October 1973-January 1974 - The administrative staff prepared

and presented reports to the Board of Education regarding:

1) the imminent fiscal crisis, 2) the status of declining enrollment trends, 3) probability that eighteen school buildings would no longer be necessary, and 4) the probability that further school closings could become an issue. _____

10. September 1974 - Eighteen halftime learning disability teacher aides were employed to allow for an increase in the number of students able to be seen by the learning disability teachers. State reimbursement for aides and increased number of students served had the effect of reducing the cost of service to individual students although increasing the cost of the total program. _____

11. January 1975-June 1975 - A committee of teachers, principals, and central office personnel developed a revised teacher evaluation instrument. _____

12. February 1975 - The Board of Education approved the recommendation of the Superintendent to reduce force by twenty classroom and special area teaching positions. The recommendations were based upon tenure status, job performance and seniority. _____

13. February 1975 - Honorable dismissal letters were sent to twenty personnel. _____

14. March 1975 - The Superintendent recommended that the Board of Education contract an independent management consultant to conduct a formal study of enrollment and fiscal projections. _____

15. May 1975 - The Board of Education approved a contract with _____

Booz, Allen and Hamilton, Inc., Management Consultants to prepare: 1) a projection of student enrollment, 2) a projection of fiscal resources, 3) a model for updating projections on an annual basis, and 4) alternate plans for resource utilization. _____

16. September 1975 - The revised teacher evaluation instrument based upon instructional improvement by objectives was implemented for use during the 1975-76 school year. _____

17. October 1975-June 1976 - A committee of teachers and principals was formed by the Director of Personnel to investigate and provide recommendations regarding reduction in force procedures. _____

18. November 1975 - Final report of Booz, Allen and Hamilton presented to the Board of Education at an open meeting which was well attended by members of the community and well reported by the local press. _____

19. November 1975-January 1976 - Nine public meetings conducted by the Board of Education and Administrative Staff to review the Booz, Allen and Hamilton report. _____

20. January 1976-February 1977 - Sixteen public meetings were conducted by the Board of Education, as a Committee of the Whole, and the Central Administrative Staff regarding school closing alternatives, use of surplus space, busing, financial costs, and the reduction of programs and/or services. _____

21. November 1975-February 1976 - Response of over 1000 community members reported the following community values: 1) main-

tenance of a quality level of education, 2) maintenance of neighborhood elementary schools (K-5 or K-6), 3) maintenance of fine arts, practical arts and physical education in the curriculum along with traditional and mandated subjects, and 4) limited busing of students of junior high school age with adequate safety precautions.

22. February 1976 - The Superintendent presented an extensive report regarding cost reduction analysis to the Board of Education for study and analysis.

23. February 1976 - Superintendent communications to staff regarding intended recommendation to reduce staff by 67.5 positions and to close one elementary school. One psychologist, one teacher of the gifted program, one administrator, and eighteen skills support teachers were included among the 67.5 positions eliminated.

24. March 1976 - Board of Education approved resolutions to: 1) close North School effective June 1976, 2) reduce staff by 67.5 positions, 3) increase class size, 4) decrease supplies, materials and support funds by 142,000 dollars, and 5) increase tax warrant position to a fifty percent level. The total amount of the action was estimated to cut 585,000 dollars from the 1976-77 budget.

25. March 1976 - Honorable dismissal letters, including a commitment to recall statement, were sent to sixty-eight certificated personnel.

26. March 1976-April 1976 - The Assistant Superintendent met with each person effected by the reduction in force action to discuss alternative job plans and review credentials and certification for other positions. Persons who had to be transferred from the North School were consulted regarding their reassignment preferences. _____
27. March 1976 - Administrative staff implemented building attendance boundaries as necessary to reassign North School students to Ridge, Olive, Windsor, and Kensington Schools. _____
28. March 1976 - Board of Education adopted a resolution to hold a tax rate referendum in May 1976, to increase the Educational Fund rate by 0.52 per one hundred dollars assessed valuation. _____
29. May 1976 - Referendum to increase educational rate passed by two to one margin and generated approximately 1,000,000 dollars for 1977-78 budget over 1976-77 tax revenue. _____
30. May 1976 - Northwest Opportunity Center, a welfare social agency, and the Summit School, a private learning disabilities school, were given leases to North School on an annual contract basis. _____
31. June 1976 - Instructional improvement by objectives teacher evaluation instrument adopted in the contract between the Board of Education and the Arlington Teachers Association. _____
32. June 1976-July 1976 - North School vacated and closed. _____
33. August 1976-September 1976 - Administrative staff urged community members to increase use of buildings as a community

service.

34. September 1976 - "Administrative Procedure for Reduction in Staff" distributed by central administrative staff. The procedure was based upon: 1) seniority, 2) teacher certification for available position, and 3) evidence that a discernable difference existed.

35. September 1976-October 1976 - Administrative staff updated projection study according to model presented in the Booz, Allen and Hamilton report and concluded: 1) live birth rates would decline by five percent annually rather than 4.1 percent assumed by Booz, Allen and Hamilton, 2) district wide enrollments projected from September 1976 to September 1986, 3) sixth through eighth grade enrollments would decrease at a slightly greater rate than kindergarten through fifth grade enrollments, and 4) Miner Junior High School enrollment would decrease by fifty percent during the next decade which would be the highest rate of any junior high school.

36. October 1976-August 1977 - After reports were presented to the Board of Education, copies of the reports or summaries were made available to the local press, persons in attendance and each school in the district for availability to that staff and local PTA leadership.

37. October 1976-August 1977 - Portions of the reports presented to the Board of Education were publicized in the local newspapers.

38. October 1976 through date - Recognition of concern among the

teaching staff by the administrative staff regarding the anticipated closing of a junior high school within the district. _____

39. October 1976-June 1977 - Meetings were held with staff members of all schools inviting discussion of closing options, alternatives and advantages and disadvantages of closing various school buildings. _____

40. October 1976-August 1977 - Reports presented to the Board of Education regarding: 1) closing of various elementary-junior high school combinations, 2) various junior high school combinations, 3) Miner Junior High School, 4) alternative staffing needs with cost factors, 5) enrollment projections to 1984 dependent upon various attendance area consolidations, 6) various cost analysis associated with closing of respective buildings, and 7) transportation alternatives and costs as associated with the closing of the various attendance centers or attendance center combinations. _____

41. October 1976-August 1977 - All communications from community members, parents and staff were read at the various meetings of the Board of Education. _____

42. December 1976-October 1977 - Roosevelt University communicated with the School District regarding interest in renting a facility if suitable to establish an extension branch of the University. _____

43. February 1977 - Board of Education approved recommendation of Superintendent to reduce staff by an additional seventeen _____

professional staff including one administrator. _____

44. February 1977 - Board of education adopted a resolution to close Wilson School effective June 1977. _____

45. February 1977-March 1977 - Assistant Superintendent met with each individual involved in reduction in force decision to discuss job alternatives. _____

46. March 1977 - Honorable dismissal letters, including a commitment to recall statement, sent to seventeen staff members including one administrator. _____

47. April 1977-August 1977 - Community groups voiced opposition to the administrative staff and Board of Education regarding the possible closing of Miner Junior High School and the rental of the facility to Roosevelt University. Groups expressed criticism that a citizens committee had not been developed regarding the decision pending before the Board of Education. _____

48. May 1977 - The increase resultant from the quadrennial real estate assessment appeared on tax bills throughout the community. The assessment increased the local tax support to the schools by approximately twenty-five percent. _____

49. May 1977 - Board of Education adopted a resolution to place North School up for sale with a minimum bid statement. _____

50. June 1977-July 1977 - Wilson School vacated and closed. _____

51. June 1977 - Board of Education and Arlington Teachers' Association agreed to implement an early retirement incentive program effective for the 1977-78 school year. _____

52. July 1977 - No bids received regarding purchase of North School. _____
53. July 1977 - The Board of Education approved a contract to lease all of the North School to the Northwest Opportunity Center on an annual contract basis. _____
54. July 1977 - The Board of Education approved a contract to lease the Wilson School to the Summit School, former rentor of part of the North School, on an annual contract basis. _____
55. August 1977 - Board of Education passed a resolution to close Miner Junior High School effective June 1978. _____
56. July 1977 - The administrative staff recommended and the Board of Education decided to separate the decision to close a junior high school building from any subsequent decision to lease such a facility to any outside agency. _____
57. July 1977-August 1977 - All staff honorably dismissed in February 1977, given an opportunity to accept positions created by matriculation and attrition. _____
58. October 1977 - Roosevelt University communicated with the School District withdrawing interest in renting the Miner Junior High School. _____
59. October 1977 - The Aptakiskic School District of Lake County communicated with the School District regarding interest in renting the Miner School to house their students. _____
60. October 1977 - The Board of Education adopted a resolution to rent the Miner School to the Aptakiskic School District on a

three year lease basis. _____

Reconstructed Events - Berkeley District 87

1. November 1968 - Student enrollment projection study prepared by Ernst and Ernst, Inc. presented to the Board of Education. The study projected increasing enrollment throughout the next decade. _____
2. January 1969 - Bond issue passed to provide for building of controversial Northlake Junior High School sought by residents of the north area of the school district. _____
3. September 1969 - Student enrollment reached an all-time peak with 3435 students enrolled. _____
4. January 1969-September 1972 - No official record of enrollment decline reported in Newsletters, Board Minutes, or other school memoranda. Enrollment records show a decline of 253 students or 13.48 percent during that period. _____
5. September 1970 - Northlake Junior High School construction completed and opened for enrollment. _____
6. June 1971-September 1971 - Riley School, built at the turn of the century, closed and demolished. _____
7. January 1973 - Board of Education directed that a study of school enrollment be prepared by the office of the superintendent. _____
8. February 1973 - Superintendent completed an estimate described as "best guess" enrollment projection through 1977. A door-to-door census of a part of the community was completed by the PTA. Field, Franklin, Jefferson, Sunnyside, and Whittier populations

projected to continue to experience significant decline. Long-fellow School population projected to increase with no projections made for other buildings. September 1976 population projected at 2675 students which was 209 students less than number subsequently enrolled.

9. July 1973 - Superintendent's resignation accepted by Board of Education.
10. September 1973 - Superintendent Poindexter employed by Board of Education.
11. October 1973 - Citizens Advisory Council appointed and by-laws adopted by the Board of Education. Council composed of fifteen members with superintendent as an ex-officio member.
12. October 1973-January 1974 - Organizational activities implemented by superintendent including development of board policy manual and personnel evaluation procedures.
13. January 1974 - Board of Education directed that a study be conducted to determine pros and cons of establishing building attendance boundaries and that a report be made to the Board of Education in January 1975.
14. February 1974-November 1974 - Memoranda, Newsletters and newspaper articles published as well as five day meetings and eight evening public meetings conducted regarding boundary issue and subsequent Kindergarten-5 and 6-8 reorganization issues.
15. April 1974 - Board established first summer school, attendance fee to offset deficit spending status.

16. July 1974-August 1974 - Live birth rate and negative immigration factors identified by central administration as the major cause of district declining enrollment. _____
17. May 1974-September 1974 - Board of Education advised of pending fiscal crisis of approximately 600,000 dollars for the 1974-75 school year. Inflation, reduction in state aid, and enrollment decline insufficient to allow for staff reductions defined as causative factors. _____
18. October 1974-November 1974 - Newsletters and newspaper articles reported to the community the fiscal status of district as well as the anticipation of increasing declining enrollment. _____
19. August 1974-January 1975 - Alternatives to reduce expenditures including reduction in force evaluated by central administrative staff. _____
20. January 1975 - Citizens Advisory Council held a public hearing regarding recommendation to establish building attendance boundaries and support of reduction in force plan developed by central administrative staff. _____
21. February 1975 - Reduction in force action taken by the Board of Education effective June, 1975. Superintendent's recommendation for reduction in force based primarily upon job performance factors. Reductions included a remedial reading teacher, a counselor, a classroom teacher, and two principals with the four lowest enrollment schools combined under the management of two principals. _____

22. May 1975 - Board of Education adopted a resolution to discontinue the summer school program at a projected savings of 4,000 dollars. _____
23. July 1975 - Board of Education adopted policies regarding transfer and required evaluation of certified and non-certified personnel. _____
24. May 1975-November 1975 - Memoranda, Newsletter, and newspaper reports distributed to community as well as eight evening public meetings held to discuss financial crisis. A fiscal deficit for the 1975-76 school year projected to be greater than 500,000 dollars despite budget cuts in terms of supplies, equipment and staff of over 250,000 dollars. _____
25. October 1975 - Board of Education established November 8, 1975, as date for a school referendum to increase education and building rates. The current education rate had been established in 1965 and the building rate established in 1962. _____
26. October 1975-November 1975 - Newsletters, newspaper, Advisory Council memoranda distributed, and public meetings held to discuss factors concerning referendum including passage as essential to prevent closing of Field and Franklin Schools. _____
27. November 1975 - Referendum defeated by greater than sixty percent margin. The referendum was carried by the Franklin, and Jefferson School areas. _____
28. November 1975 - Reports to the Board of Education and Newsletter to parents prepared by Superintendent indicating need to

cut 600,000 dollars from the 1976-77 budget. _____

29. November 1975 - Central office administration compiled a list of all possible budget cuts in random order. _____

30. November 1975-December 1975 - Central office administration met with building principals, Educational Association, and Advisory Council to establish a priority sequence of possible reductions. The Educational Association published a statement to operate on deficit spending basis until school district could no longer operate and to then close the schools. _____

31. January 1976 - An open meeting of the Citizens Advisory Council was held to discuss their priority of recommendations regarding budget cuts. _____

32. February 1976 - Public hearing held to discuss the recommendation of the Citizens Advisory Council to close the Field and Franklin Schools at the end of the school year. _____

33. February 1976 - Board of Education adopted a resolution to: 1) close Field and Franklin Schools in June 1976, 2) raise class size to thirty-five, 3) reduce forty certificated positions, 4) reduce twelve classified positions, 5) reduce supplies expenditures by 52,000 dollars, and 6) establish fees for general supplies, art supplies, band, after school sports, lunch supervision, and intramural activities. _____

34. February 1976 - Honorable dismissal letters effective June 1976 sent to forty certificated personnel including all non-tenured staff and tenured staff on a job performance basis as

well as twelve classified personnel. _____

35. March 1976 to date - Letter campaign implemented by Superintendent to all possible renters including universities and colleges, Illinois School Board Association, Illinois Department of Motor Vehicles, municipal agencies, pre-school agencies, social or welfare agencies, and religious orders or organizations. _____

36. March 1976 - Survey conducted by central administrative staff of community opinion regarding possible uses of Franklin and Field Schools. _____

37. May 1976 - Board of Education adopted building attendance boundary changes reassigning children from Franklin School to Riley and Whittier Schools; reassigning students from Field School to Sunnyside School. _____

38. May 1976 - Rental of Franklin School effective September 1976 to a Special Education Cooperative for use as an alternate high school. Rental contract on an annual fee and utility basis with District providing maintenance service. _____

39. June 1976-August 1976 - Field and Franklin Schools vacated and closed. _____

40. July 1976 - Board of Education adopted resolution reassigning six of eight building principals to facilitate objectivity in the personnel evaluation process. _____

41. July 1976 - Rental of Field School to MacCormac Business College effective September 1976. Rental contract, with a five year option, on an annual fee and utility basis with District

providing maintenance service. _____

42. August 1976 - Board of Education employed a teacher, from other than the previously dismissed tenured staff, to fill a position created by a resignation. _____

43. August 1976 - Illinois Education Association initiated court action in behalf of the Berkeley Education Association stating that any position created by a resignation of a staff member after dismissal of a tenured teacher obligated the Board of Education to employ a teacher formerly dismissed. _____

44. August 1976-October 1976 - Newsletters, memoranda documenting intended use of referendum monies, newspaper articles, PTA releases, Citizens Advisory Council releases, Superintendent's appearance on public broadcast radio, and two public hearings conducted to discuss financial needs. _____

45. September 1976 - Board resolution adopted to conduct a rate referendum in October 1976. The consequence of further school closings was associated with the need for additional revenue. _____

46. October 1976 - Rate referendum defeated by a two to one margin. _____

47. October 1976 - A seniority clause regarding reduction in force and an early retirement incentive provision incorporated into the "1976-77 contract between the Board of Education and the Education Association." _____

48. October 1976 - The professional staff evaluation instrument revised by the central administrative staff to agree with the

exact language used in the negotiated contract regarding provisions for release of teachers when out of seniority sequence. _____

49. November 1976-December 1976 - Financial condition of District publicized by Newsletters, newspaper articles, and Superintendent's appearance on Channel 5 television. _____

50. January 1977 - Two public hearings held to discuss the recommendation of the Citizens Advisory Council to close Longfellow, Twain, Whittier, and Jefferson Schools as well as to establish a two campus middle school (K-4, 5-8) organizational concept. _____

51. February 1977 - Board of Education adopted a resolution to close Longfellow and Twain Schools in June 1977 and to close Whittier and Jefferson Schools in June 1978 in accord with the recommendation of the Superintendent. _____

52. February 1977 - One Citizens Advisory Council member resigned his position since the Board of Education did not accept total recommendation of the Citizens Advisory Council. _____

53. March 1977 - Board of Education adopted a resolution to release six classroom teachers upon seniority basis and recommendation of the Superintendent. _____

54. March 1977 - Honorable dismissal notices sent to six certificated staff. _____

55. March 1977 - Board of Education adopted a resolution to accept the concept of upper grade centers for current junior high schools and established attendance boundaries for areas affected by Longfellow and Twain closings. _____

56. May 1977 - Board of Education adopted a resolution to rent second floor of Jefferson School to the Department of Public Health in June 1977. _____
57. May 1977 - Central Administrative Staff conducted survey of public opinion regarding acceptable uses of Longfellow and Twain Schools. _____
58. June 1977 - Board of Education adopted a resolution to place Longfellow School up for public auction due to age of facility and related maintenance factors. _____
59. May 1977-August 1977 - Reports made to Board of Education and memos to community regarding accrued deficit of approximately 500,000 dollars and anticipated decrease in State aid of approximately 200,000 dollars for 1977-78 school year. Newsletters sent to parents indicating programs and services have been cut to most minimal levels possible and that District 87 ranks twenty-fifth out of twenty-six West Cook County School Districts in staff per 1,000 pupils. _____
60. June 1977-July 1977 - Longfellow and Twain Schools vacated and closed. _____
61. June 1977-August 1977 - Survey conducted by outside consultant to learn community opinion regarding advisability of conducting another rate referendum during the 1977-78 school year. _____
62. July 1977 - District Court ruled in favor of Board of Education and granted a motion "to quash and dismiss" the

action brought by the Illinois Education Association in August 1976. _____

63. August 1977 - Poll of the members of the Board of Education indicated opposition to limited use of rental contract of Twain School to a church congregation. _____

64. October 1977 - Board of Education rescinded the action taken February 1977, to close Whittier and Jefferson Schools in June 1978, pending further study and analysis. _____

Summary

In 1969 Arlington Heights School District 25 and Berkeley School District 87 reached peak school enrollments. Both school districts had experienced a period of rapid enrollment increase during the years of the nineteen hundred and sixties. Both school districts engaged in building programs to keep concurrent with their expansive school populations. Each of the districts completed the construction of new school facilities during the early nineteen hundred and seventies. Each of the districts employed outside consulting firms to complete school enrollment projections. One of these projection studies proved almost totally contradictory to subsequent enrollment trends¹ while the other proved to be near accurate in projecting student enrollment.²

¹ Ernst and Ernst, Inc., "School District 87 Enrollment Survey." Chicago, 1969. (Mimeographed.)

² Booz, Allen & Hamilton Inc., "Study of Enrollments and Fiscal Projections, and Alternative Actions to Improve Resource Utilization." Chicago, 1975. (Mimeographed.)

District 25 and District 87 both have experienced severe fiscal crises. The increased assessed valuation and the decrease state aid has placed a heavier burden upon the local communities to support their school programs. The Arlington Heights community responded positively to a rate referendum to increase the level of local support while the composite communities comprising the Berkeley School District have repeatedly refused to pass rate referendums to increase the level of local support.

The two school districts have both experienced significant reduction in force among their certified staffs. Arlington Heights School District 25 has reduced professional staff by more than eighteen percent while Berkeley School District 87 has been subjected to professional staff reductions of more than thirty-three percent.

The districts involved in the study have been required to close school buildings in rapid order. The districts constitute the total population of school districts in Cook County, Illinois, which have taken action to close four buildings prior to September 1977 directly resulting from declining student enrollments. Since Arlington Heights School District owned a total of nineteen buildings, the closing factor could be regarded as far less crucial than to Berkeley School District, since it owned only ten school buildings.

Finally, both school districts have combated the problems associated with utilization of surplus space. Arlington Heights has been successful in developing suitable lease agreements for all of their closed buildings although not without some considerable consternation.

Berkeley School District has attained moderate success in acquiring suitable leasing agreements for their buildings. Both districts have attempted unsuccessfully to dispose of buildings through sale.

Chapter III has discussed the tasks assigned to the members of the two expert boards of observers as well as a discussion of the decision making model employed by the boards of observers as they participated in partial analysis of the events that occurred in District 25 and District 87.

This Chapter has further contained a reconstruction of development of the events preceding schools closing in terms of the decisions and events. The major strategies, events, and decisions that took place during the ten year period were arranged chronologically.

Chapter IV deals with an analysis of the reconstructed events. The analysis has been based upon the observer ratings of the reconstructed events in terms of their application of the five stages of the problem solving model. The analysis has been further based upon the magnitude of additional information regarding the issues and events prevalent throughout the case study research process.

CHAPTER IV

THE PRESENTATION AND ANALYSIS OF THE DATA

Introduction

This chapter has provided an extensive analysis of the data acquired throughout the entire case study process. The analysis has, however, specifically highlighted the observations of the two panels of expert observers as they reviewed the reconstruction of events in each district in reference to a specific problem solving model. In addition, the concerns of board members, parents, teachers, and principals regarding the closing of schools has been contrasted to concerns expressed in the literature and implications have been drawn regarding specific areas of congruency as well as divergence. Finally, the fiscal conditions of the district, sources of revenues, enrollment statistics, and plant utilizations have been presented and analyzed. The extensive analysis has been presented with the intention of providing further reference guidelines for those boards of education and administrators who may seek information regarding the problems of declining enrollment. A specific listing of the conclusions drawn from the analysis described above has been presented in Chapter V.

It has been recognized that the information presented in this dissertation does not contain the solutions to the problems of declining enrollment. It is hoped, however, that through adaptation and inference some assistance may be provided to colleagues as they seek

solutions to the difficult problems confronting school districts throughout the State of Illinois.

Analysis of the Observers' Rating of Events
to the Problem Solving Model

The initial analysis of the data has been included in table form depicting a review of the observers' ratings. Statistical inference has not been a part of the analysis; rather, trend in observer rating has been utilized. Agreement among three of the five observers has been designated as indicative of a trend for the purpose of this study. The analysis has included a review of the implications derived from the classification of events by either panel of experts. The analysis of the similarities and differences reflected by the opinions of each panel of experts has been further accomplished. A last section in the analysis of the events has included a discussion of the similarities and differences between the derived implications as reflected by the opinions of the panels of experts and the review of the literature.

Analysis of Raw Score Information

The raw score responses by each of the members of the panel of school superintendents and each of the members of the panel of business executives has been listed in table form. The responses by each of the panels to the events have been presented on separate tables for Arlington Heights District 25 and for Berkeley District 87. The supporting documents reporting the raw score information are contained in Appendix A.

The responses for each panel have been reviewed to determine the agreement among panel members in classifying the same events to specific steps of the problem solving model. Regarding Arlington Heights District 25 events, it has been noted that the panel of school superintendents showed three or more observer agreement regarding forty-nine of the sixty events or agreement upon approximately eighty-two percent of the events. The panel of business executives showed observer agreement upon forty-seven of the sixty events or upon approximately seventy-eight percent of the items.

The responses of each panel to events reported for Berkeley District 87 have been reviewed in a similar manner. It has been noted that the superintendents showed observer agreement on fifty-eight of the sixty-four events or upon approximately ninety percent of the Berkeley events. The business executives indicated agreement of three or more observers on forty-seven of the sixty-four events or upon approximately seventy-three percent of the events.

Upon reviewing the raw score responses by each of the two panels for both of the school districts, it could be assumed that the panel of superintendents demonstrated a tendency for greater agreement in terms of the classification of events to specific steps of a problem solving model than did the panel of business executives. A tendency for greater agreement could perhaps be related to the semantic interpretation of educational events made by the superintendents or perhaps to a tendency for educators to make common assumptions regarding data that would be less familiar to the business executives outside of the schools.

Table 1 and Table 2 have been constructed to provide further analysis of the raw score data. It should be noted that considerable variance existed among both the members of each panel as well as between the panels in using the problem solving model. The analysis, at this point, has been intended to review the manner in which the observers applied the model but has not attempted to review the significance of the content of the events. The analysis of the significance of the events is extensive and has, therefore, been exhaustively discussed in a subsequent section.

Tables 1 and 2 have indicated the number of events from District 25 and District 87, respectively, that each observer classified as a specific step on the five-step problem solving model. In addition, Tables 1 and 2 have indicated the mean number of events classified as a specific step by each panel of experts.

Throughout the study, a trend in observer rating has been defined as the classification of an event to the same step of the problem solving model by three or more observers. The same rationale has been used for purposes of the following discussion. A trend has been noted when three or more observers assigned events to a step, equal or near equal, to the mean number of events which were reported by the full panel.

Upon inspection of Tables 1 and 2 a trend has been noted for superintendents to classify fewer events as step 1, identification of a concern, than did the business executives. Perhaps the superintendents' familiarity with the semantic content of the items could account for a tendency for fewer items to be classified as events indicating

TABLE 1

NUMBER OF EVENTS ASSIGNED TO THE PROBLEM
SOLVING MODEL STEPS BY THE MEMBERS
OF EACH PANEL REGARDING THE
DISTRICT 25 CHRONOLOGY

Observer	Problem Solving Model Steps					Total Events
	Step 1	Step 2	Step 3	Step 4	Step 5	
Superintendent:						
Number 1	2	9	14	15	20	60
Number 2	1	8	22	25	4	60
Number 3	2	7	16	29	6	60
Number 4	5	4	18	21	12	60
Number 5	0	16	25	17	2	60
Total Events	10	44	95	107	44	
Mean Number of Events	2	8.8	19	21.4	8.8	
Business Executive:						
Number 1	10	5	5	38	2	60
Number 2	7	3	12	16	22	60
Number 3	4	10	19	27	0	60
Number 4	3	5	22	19	11	60
Number 5	11	1	9	35	4	60
Total Events	35	24	67	135	39	
Mean Number of Events	7	4.8	13.4	27	7.8	

TABLE 2

NUMBER OF EVENTS ASSIGNED TO THE PROBLEM
SOLVING MODEL STEPS BY THE MEMBERS
OF EACH PANEL REGARDING THE
DISTRICT 87 CHRONOLOGY

Observer	Problem Solving Model Steps					Total Events
	Step 1	Step 2	Step 3	Step 4	Step 5	
Superintendent:						
Number 1	5	10	18	17	14	64
Number 2	1	6	27	30	0	64
Number 3	3	7	14	35	5	64
Number 4	3	4	6	37	14	64
Number 5	1	10	26	19	8	64
Total Events	13	37	91	138	41	
Mean Number of Events	2.6	7.4	18.2	27.6	8.2	
Business Executive:						
Number 1	8	2	7	47	0	64
Number 2	8	5	4	25	22	64
Number 3	4	10	18	32	0	64
Number 4	9	11	18	16	9	63
Number 5	17	10	11	26	0	64
Total Events	46	38	58	146	31	
Mean Number of Events	9.2	7.6	11.6	29	6.2	

identification of a concern. Such a trend, however, could also lend credence to the concept that citizen groups should become more active in the analysis of problems confronting the public schools. The greater identification of events by the business executives as step 1, identification of a concern, could further reflect the need of school personnel to more deeply probe and critique issues and events as they enter into the decision making process.

It should be further noted that step 5, adaptation and diffusion, on Tables 1 and 2 reflected the widest range of variance by the members of both panels in assigning events pertaining to both districts. Perhaps the variance of response to step 5 may be explained by reviewing the definition of step 5 of the problem solving model. The phrase taken from the definition of step 5, "shared with others who face similar problems," may have contributed to the variance response between the panel members. Upon review of the items classified as step 5 by the various panel members, it appears that some observers regarded the word "others" to mean colleagues in the field. Perhaps some observers interpreted "others" to mean proclaiming a decision making action to the general public.

Analysis of the Similarities and Differences
Regarding the Classification of Events
to Steps of the Model

The analysis has been divided into three components in order to facilitate the discussion of the similarities and differences. The similarities and differences were identified by the two panels as they classified the events to steps of the problem solving model. The first

component of the analysis considered was:

1. the events receiving three or more observers agreement,
2. the events classified to the same steps of the model by both of the panels.

The second component of the analysis considered was:

1. the events receiving three or more observers agreement but classified by the panels to different steps of the model,
2. the events receiving three or more observers agreement by only one of the panels.

The third component of the analysis dealt with the events receiving less than three observers agreement by both panels.

Analysis of the Events Receiving Observer Agreement by Both Panels

The events receiving three or more observer agreement and classified to the same step of the problem model by both panels have been designated as the events most clearly representative of similarity. The implications extrapolated from the events were regarded as the topic of analysis rather than the specific content of the events themselves. Further, the implications drawn from the events were regarded as singularly relevant to the problems of declining enrollment. An analysis of the events has presented a review of the similarities between both districts, between the opinions of both panels, and with the related literature pertaining to the problems of declining school enrollment.

In order to establish a base for the analysis of the similarities expressed by the panels of experts, Table 3 and Table 4 have been

developed. The information contained within these tables has also provided a reference point from which to extrapolate the common implications from the specific events which occurred in the districts.

Table 3 and Table 4 have provided the event numbers as well as the total number of events receiving 3, 4 or 5 observer agreements as assigned by each panel to a specific step of the problem solving model. In addition, the tables contain the event numbers agreed upon by both panels of experts as appropriate to a specific step of the model. Table 3 has reported the information relative to District 25 while Table 4 has reported the information for District 87.

The events for both District 25 and District 87 have been discussed simultaneously since the implications extrapolated from the events have been the topic of analysis rather than were the events themselves.

Implications drawn from events classified as step 1, identification of a concern. Only one event from each district was reported as receiving 3 or more observer agreement of both panels.

Implication 1: Awareness of having reached peak enrollment should be noted with due concern (event 1--District 25).

Implication 2: The lack of reporting and/or maintaining reports pertaining to the recognition of a trend for declining enrollment should be regarded with concern (event 4--District 87).

The literature emphatically indicated that school districts should not only be alert to a trend for changing enrollment patterns, but should routinely project enrollment for five to ten years into the future. Many

TABLE 3

SUMMARY OF THE ANALYSIS OF THE RESPONSES BY THE PANELS
INDICATING AGREEMENT OF 3, 4 OR 5 MEMBERS TO THE
CHRONOLOGY OF EVENTS IN DISTRICT 25

Problem Model Step	Events Agreed Upon by School Superintendents		Events Agreed Upon by Business Executives		Events Agreed Upon by Both Panels of Experts	
	Event No.	Total	Event No.	Total	Event No.	Total
Number 1	1	1	1 9 38	3	1	1
Number 2	5 6 8 14 17 38		14 15		14	
	48	7		2		1
Number 3	2 7 9 11 16 18		2 11 17 23 39		2 11 23	
	20 22 23 26 27		40 41 42		40 41 42	
	33 40 41 42 59	16		8		6
Number 4	3 4 10 12 13 24		4 5 7 10 13 16		4 10 13	
	28 29 30 31 32		24 25 26 28 31		24 28 31	
	43 44 49 50 51		32 33 34 43 44		32 43 44	
	52 53 54 55 56		45 46 47 48 49		49 50 51	
	60		50 51 52 53 54		52 53 54	
			55 56 57 58 59		55 56 60	
		22	60	32		18
Number 5	34 36 37	3	36 37	2	36 37	2
Total Events		49		47		28

TABLE 4

SUMMARY OF THE ANALYSIS OF THE RESPONSES BY THE PANELS
INDICATING AGREEMENT OF 3, 4 OR 5 MEMBERS TO THE
CHRONOLOGY OF EVENTS IN DISTRICT 87

Problem Model Step	Events Agreed Upon by School Superintendents		Events Agreed Upon by Business Executives		Events Agreed Upon by Both Panels of Experts	
	Event No.	Total	Event No.	Total	Event No.	Total
Number 1	4	1	1 3 4 7 16 17	6	4	1
Number 2	1 3 8 16 17 61 63	7	18 28	2	N/A	0
Number 3	7 12 19 20 25 29 30 32 35 36 44 62	12	19 20 29 30 31 32	6	19 20 29 30 32	5
Number 4	2 5 6 9 10 15 21 22 23 27 33 34 37 38 39 40 41 42 43 45 46 47 48 51 52 53 54 55 56 58 60 64	32	5 6 12 15 21 22 23 26 33 34 35 36 37 38 39 40 41 42 43 44 45 47 48 52 53 54 55 56 59 60 62 63 64	33	5 6 15 21 22 23 33 34 37 38 41 42 43 45 47 48 52 53 54 55 56 60	25
Number 5	14 18 24 26 49 59	6	N/A	0	N/A	0
Total Events		58		47		31

factors including rates of economic growth of the community, rates of migration, age, racial, socio-economic composition, values, and attitudes must be specifically considered as relative to each individual district. Numerous systems of projection have been presented based upon consideration of live birth rates, migration rates, mortality rates, and current population estimates by age groups as major relevant factors.

Implications drawn from events classified as step 2, diagnosis of the situation. Only one event was recognized as relevant to step 2, diagnosis of the situation, by both panels of experts.

Implication: A board of education should obtain the assistance of an outside consultant in developing a comprehensive study of enrollment and of fiscal projections (event 14--District 25).

The literature has not indicated emphatically that an outside consultant was best able to accomplish enrollment and fiscal projection studies. Reflection upon the apparent attitudes of citizens in the "era of the post-Watergate society" would tend to strongly suggest the desirability of contracting an independent, reputable, and appropriately qualified consultant. It has been further well recognized that the credibility of an outside consultant generally supersedes that of local personnel even though local persons may be equally qualified. Finally, the local resources available both in terms of availability of personnel as well as technology and mechanical assistance could often be insufficient within smaller districts to develop a comprehensive study. If, however, resources or other local factors restrict the use of a specialized consultant, the literature frequently refers to projections

made with the assistance of community volunteers. The study described as a "best guess" study conducted in District 87 exemplifies the remarkable accuracy with which enrollment can be projected using local resources. In any event the impact of the literature has been definite regarding the need for school districts to accomplish advance planning.

Implications drawn from events classified as step 3, formulating action alternatives. Eleven events were classified by both panels of observers as representative of step 3, formulation of action alternatives.

Implication 1: Once a recognition has been made that students may be accommodated in another building, it is appropriate that action be taken (event 2--District 25).

Both the literature and the chief administrator of the districts participating in this study strongly support the concept that action must be taken once a definite declining enrollment trend has been noted and statistics show that students from a given school could be accommodated in other schools.

Implication 2: Planning to meet the restrictions imposed by a fiscal crisis including reduction in force should be a joint venture of at least administrative and teaching staffs (events 29, 30--District 87; events 11, 19--District 25).

In addition to suggesting that school staff must be involved in planning to deal with fiscal crisis, the literature strongly supported the involvement of community members in the planning process. It should be noted that although the two panels of expert observers did

not classify events relating to community involvement as areas of joint agreement, both District 25 and District 87 obtained wide input from the respective communities. District 87 developed a Citizens Advisory Council which has been singularly advocated by the literature while the District 25 Board of Education acted as a committee of the whole in conducting numerous public hearings.

Implication 3: Planning relating to the closing of a school should be a joint venture of boards of education, administrators, community members, and teachers (events 20, 32--District 87; events 23, 40--District 25).

The literature further strongly supports that the planning regarding the closing of school buildings be a joint venture of boards, administrators, community, and teachers. It has been further reported that input from students is also desirable. Conscientious consideration should be given to the development of alternative uses of a building, alternative attendance area boundaries, alternative combinations of possible building closings, alternative grouping of graded or non-graded programs, alternative cost comparisons of operation and maintenance of various buildings, as well as alternative costs related to transportation. The above considerations are but a few of the issues to be considered as building closings are anticipated.

Implication 4: Members of the community should be strongly encouraged to express their concerns regarding the closing and subsequent users of neighborhood schools (events 41, 42--District 25).

"Schools reflect the community" has been a common theme within

the literature. Community members must not only have a voice in the decisions to close schools but must further have a voice in the subsequent uses of the buildings. Since most schools are built within residential neighborhoods specific attention must be given to the creation of possible traffic patterns, the safeguards for children's safety, and the compatibility of the subsequent user with the predominant social-economic self-portrait of the community.

Implications drawn from events classified as step 4, feasibility testing of selected alternatives. An impressive degree of agreement existed between the panel of superintendents and the panel of executives. Agreement was reached between the panels on forty-three events classified as step 4, feasibility testing of action alternatives.

Implication 1: The ultimate decisions regarding the holding of tax rate referendums, the approval of the budget, the release of staff, the closure of buildings, the sale of buildings, the demolition of buildings, and the lease of buildings are decisions uniquely the responsibility of the boards of education (events 4, 24, 28, 43, 44, 49, 53, 54, 55, 56--District 25; events 6, 21, 33, 38, 41, 42, 45, 53--District 87).

The literature pertaining to declining enrollment has not specifically addressed the area of responsibility of the boards of education especially as related to legal or governance responsibilities. It has been established by historical precedent and certainly by Illinois statute that a public school board has all powers delegated to it by the statutes and may, furthermore, have authority on matters of governance of the school district unless jurisdiction has been expressly

denied to it. This power granted to a board of education is regarded as unique among governmental agencies.

Implication 2: Some reduction in expenditures may be realized by employment of teacher aides, establishment of service or supplies fees, discontinuance of non-mandated programs, and the increase of class size (events 10, 24--District 25; events 15, 22, 33--District 87).

The literature has supported the concept that some savings in expenditures may result from program and supply reductions, use of teacher aides, and increase of class size. It must be noted, both from a review of the literature and a review of the accumulated data from the districts, that any significant budget cuts must be made in the area of personnel reduction and to a lesser extent in the closing of school buildings. Case study documentation would indicate that the closing of a school building may result in a budget reduction of at least fifty to eighty thousand dollars depending on the size and physical condition of a building. These costs are exclusive of teacher salaries, reduced utility, and reduced maintenance costs. These costs include administrative, secretarial, and custodial costs.

Implication 3: Reduction in force must be implemented in accord with the Illinois School Code (events 13, 49--District 25; events 34, 43, 54--District 87).

The literature was explicit in charging administrators to acquaint themselves with the legal rights and responsibilities of

teachers specific to the school codes of the respective states regarding the issue of reduction in force.

Implication 4: Teachers released from positions by a decision of the board of education to decrease the number of teachers employed or to discontinue some particular type of teaching service do not have the explicit right to subsequent positions created by vacancies attrition, death, or marriage (event 43--District 87).

The reference regarding teachers' rights to vacant positions has not been specifically addressed by the literature. The Report of the Proceedings of the Circuit Court of Cook County in the case initiated by the Illinois Education Association against the Berkeley Board of Education does support Implication 4. Judge Curry's summary as contained in the Report of Proceedings has been presented in Appendix B of this dissertation.

Implication 5: Declining enrollment may precipitate the need for specific school board policies or adjustments to the teacher bargaining contracts (events 31, 51--District 25; events 23, 40--District 87).

The literature has cautioned school boards to develop specific policies in preparation for reduction in force. The literature further emphasized that negotiations should be directed away from salary issues and directed towards job security issues. Specific board policies developed by the districts participating in this case study were related to early retirement incentives, teacher evaluations, and teacher transfers. Several of the board policies were also entered into the content of the bargaining agreements.

Implication 6: Closing of schools may be disruptive to the neighborhood school concept and may require that a different model for grouping children be employed (events 37, 55--District 87).

The literature generously addresses the area of impact upon neighborhoods as related to school closings. The advantages of small schools in terms of personalization of instruction and the disadvantages associated with restricted options for programming are also widely discussed. It has been noteworthy from review of case study datum to note the role that semantic interpretation has played in terms of student grouping. One community was unilaterally opposed to the development of "middle school" programming by which fifth thru eighth grade students would attend the same attendance centers but gave approval to implement the development of "upper grade centers" to house fifth thru eighth grade students.

Implication 7: There is a limited market for the purchase of older school buildings (event 52--District 25).

A review of the literature would tend to suggest that there is a wide and diversified market for old school buildings. The literature reports conversion of schools to community centers, unique shopping centers, and apartments for senior citizens. The experiences of both school districts participating in the case study have suggested that the market for old school buildings is somewhat more limited in Cook County, Illinois.

Implication 8: An appropriate contract for the rental of school buildings includes rental on annual basis, with leasor

paying utilities, and the school district providing maintenance service (events 54, 56--District 25; events 38, 41--District 87).

The related literature has not promoted any specific leasing agreement model indicating that such matters are more appropriately the concern of the local district. In the interest of communicating some of the contingencies associated with the development of a lease, a sample lease drawn from this study has been included in Appendix C of this dissertation. The advantages of an annual lease or one limited to a few years provides a school district with considerable flexibility should it again require the use of the building. The escalating costs of utilities provide further advantage to the district to use an annual lease as does the opportunity to retain jurisdiction over the maintenance positions.

Implications drawn from events classified as step 5, adaptation and diffusion. The panels of expert observers reported agreement upon two events classified as step 5, adaptation and diffusion.

Implication: It is essential that extensive information be available to boards of education, community members, local press, school personnel, and school organization leadership groups such as PTA groups (events 36, 37--District 25).

The need for clear, factual, and comprehensive dissemination of information has been overwhelmingly emphasized by the literature. It has been further concluded from the research, that the success met by the two districts in dealing with their declining enrollment problems has been in large part related to the extensive dissemination of information.

In retrospect, the preceding comments have been classified by both panels as indicative of three or more observers agreement. The implications drawn from the events have been regarded for the purposes of this study as singularly important to the process of resolving the problems associated with declining enrollment.

Analysis of Events Classified Differently by the Panels

The following discussion has reviewed those events classified differently by the panels. The differences in classification have included a discussion of:

1. events receiving three or more observers agreement but classified by the panels to different steps of the model,
2. events receiving three or more observers agreement by only one of the panels.

This section of the analysis has highlighted the differences existing between the districts as they encountered and attempted to resolve the problems associated with declining enrollment. In addition, the differences between the opinions of the superintendents and business executives have been analyzed. The differences have been indicated by the classification of the same event to different steps of the model. Further, the varying opinions could have ranged from total agreement by one panel to no agreement by the other in the classification of the same event.

The responses of each panel to the events which received five of five, four of five and three of five agreement have been presented on separate tables. The supporting documents indicating

the specific events and the levels of agreement are contained in Appendix A.

An attempt has been made to extrapolate the implications common to the various events having occurred in the districts. An analysis of these implications, rather than the events themselves, has been the primary concern of the discussion. Since many of the same events were classified differently by each panel, a given event has been discussed only upon the initial reference made to it by either panel.

Implications drawn from the differences in classification of events to step 1, identification of a concern. The following are implications drawn from the responses of the panel members:

Implication 1: The business executives showed a tendency to regard many more events as indicating a concern than did the school superintendents (events 9, 38--District 25; events 1, 3, 7, 16, 17--District 87). Seven events were classified by the business executives as step 1. The superintendents regarded two events as step 1.

Implication 2: Many events regarded as identification of a concern by businessmen were reported as diagnosis of a situation by superintendents (event 38--District 25; events 1, 3, 16, 17 District 87).

One of the functions of a school superintendent would include the promulgation of information to make known the concerns of school districts. It would appear logical, therefore, that some events regarded by the businessmen as identification could have been interpreted as diagnostic by the superintendents. An incongruity relative

to the above assumption was evident, however, among one of the five events. Event number 1 from District 87 contained a dual concept. It reported the development of a projection survey, but the survey was conducted by an agency primarily known as a fiscal accounting firm.

Implications drawn from the differences in classification of events to step 2, diagnosis of the situation. The following implications have been drawn from the classification of events occurring in the districts:

Implication 1: 1 The superintendents regarded many more events as diagnosis of a situation than did the businessmen.

The school superintendents reported a total of fourteen events as representative of step 2 while the business executives classified only four events to step 2.

Implication 2: Major disagreement was reported in the classification of the same events to step 2 by the panels.

Of the seventeen total events classified to step 2 by one or the other of the panels, disagreement was noted between the panels regarding sixteen of the events.

Implication 3: Perhaps superintendents do not concur regarding the necessity of using outside consultants to develop enrollment projection surveys (event 15--District 25).

The event described the action of the school board to employ a management consultant firm and detailed the components of the contract to be performed. The event was regarded as a diagnostic

activity by the businessmen, but no agreement regarding the event was reached by the superintendents.

Implication 4: Events describing functions of school administrators were interpreted as no agreement events by businessmen (events 6, 8--District 25; event 61--District 87). The three events described functions performed by administrators such as conducting informal projection surveys, conducting community opinion surveys, and reviewing literature relating to declining enrollment.

Implication 5: Business executives showed some tendency to regard those functions as diagnostic which were regarded as adaptation and diffusion by superintendents (event 18--District 87).

Event 18 dealt with communications directed to the community regarding the fiscal status of the district and the increasing trend for declining enrollment. Diagnosis of a concern for the business executives could be related to information presented to boards and communities. Information as cited in event 18 would usually be prepared by the office of the superintendent and may, therefore, logically be regarded as an adaptation and diffusion function by the superintendents.

Implications drawn from the analysis of the differences in the classification of events to step 3, formulating action alternatives. The following implications have been taken from the responses of the panels of expert observers.

Implication 1: A difference appeared to exist between what superintendents regarded as formulation of action alternatives as

opposed to what the businessmen regarded as such (events 7, 16, 26, 33, 59--District 25; events 12, 35, 36, 44, 62--District 87).

Twenty-six events were classified by the superintendents as formulating action alternatives. The two panels showed agreement in the classification of eleven of the events but disagreement upon ten others. Many of the ten events noted above appeared to be indicative of action in progress or action completed rather than consideration of possible actions.

Implication 2: The business executives seemed to express a higher incidence of no agreement to events involving the communication of prepared information for the board or community (events 18, 20, 22--District 25).

All of the above events described the reporting of formal studies or dissemination of information through public meetings. The businessmen reported no agreement for all of the events.

Implication 3: The school superintendents seemed to express some incidence of no agreement to events regarding the pursuance of input from staff and community (event 39--District 25; event 31--District 87).

Event 39 from District 25 pertained to holding meetings with the staff to discuss alternatives to school closings. Event 31 from District 87 regarded holding open meetings to consider alternative budget cuts. Both of the events were reported as no agreement events by the panel of school superintendents.

Implication 4: The business executives seemed to express some incidence of no agreement regarding matters essential to either board or administrative responsibility (events 27--District 25; event 25--District 87).

The above events referred to the establishment of rate referendum dates and the establishment of building of attendance boundaries. Both functions would be regarded as essential to the operation of a school district. The businessmen reported no agreement for both events.

Implications drawn from the analysis of the differences in the classification of events to step 4, feasibility testing of selected alternatives. The events reported as disagreement between the two panels, regarding step 4, pertain to two significant implications.

Implication 1: The interpretation of less than three observer agreement has been regarded as inadequate to classify events as no agreement or noncritical (events 3, 12, 25, 29, 30, 45, 46, 47, 57, 58--District 25; events 2, 9, 10, 27, 46, 51, 58--District 87).

All seventeen of the events listed were reported as no agreement events by either the businessmen or superintendents. All of the events would be considered essential to the operation of a school district. Eleven of the events reported would not only be regarded as critical to the operation of a school district but, in fact, are required for the legal operation of a district.

Implication 2: The professional training and experience of the panels of experts appeared to influence the incidence of agreement

regarding events essential to educational management (events 3, 12, 29, 30, 25, 46--District 25; 2, 9, 10, 51, 58--District 87).

Eleven critical events were classified by the business experts as no agreement events. The Illinois School Code would define eight of those events as mandatory to the operation of a school district. Six critical events were also reported by the school superintendents as no agreement events. Two of the events are also mandated by the Illinois School Code. One additional event, an event common to many school districts, was required by the terms of a legally binding bargaining contract.

Implication 3: It could be inferred that action of the board of education had a different connotation to school superintendents as compared to business executives.

Of twenty-six events classified by at least four of the superintendents as step 4, fifteen of the events involved the direct action of the board of education. In contrast, of the twenty-four events classified by at least four of the business executives as step 4, only eight of the events involved the direct action of the board.

Implications drawn from the analysis of the differences in the classification of events to step 5, adaptation and diffusion.

The following implications are drawn from the responses of the panels to step 5:

Implication 1: The superintendents showed a tendency to classify more events as adaptation and diffusion than did the business executives.

The superintendents regarded nine events as adaptation and diffusion while the business experts classified two events at this step. The panels agreed upon the classification of these two events which both reported the release of information to the media.

Implication 2: The superintendents reported a higher level of agreement regarding the communication of information to various segments of the community than did the business executives (events 14, 24, 49--District 87).

All three of the above events reported communication of information to a wide spectrum of people through a varied use of media.

Additional implications drawn from the analysis of the differences in classification of events to steps of a problem solving model in District 25 and District 87. The superintendents' responses appeared to reflect a different understanding of the nuances of working effectively with a board of education than did the business executives' responses as indicated by events 9, 10 and 63 from District 87. Events 9 and 10 dealt with the resignation of a superintendent and subsequent employment of another. Event 63 regarded informal polling of a board of education regarding possible solution of a volatile issue. Certainly the issues surrounding declining enrollment are explosive enough that positions may be lost or careers interrupted.

It would be further logical to conclude that resultant of specialized training the school superintendents reflected a more comprehensive understanding of the responsibilities of the board

of education and of its chief executive officer. This assumption could be implied from events 25, 51 and 58 from District 87.

Business executives seemed to regard the classification of events more purely from the content of events as may have been indicated by responses to events 9, 38 and 14 from District 87. This assumption would be logical in that superintendents could draw inferences, beyond the specific content of an event, based upon their background of school experiences.

In addition, the business experts seemed to place more regard upon issues involving the staff than did superintendents as noted in responses to events 25, 39, 45, 46 and 57 from District 87.

Analysis of Events Receiving Less Than Three Observer Agreement by Both Panels

The final component of the analysis of the similarities and differences has considered the analysis of the events receiving less than three observer agreement by the panels.

Table 5 has presented the event numbers that received less than three observer agreement by each panel. In addition, Table 5 has reported the events from both districts receiving less than three observer agreement by both panels. The implications drawn from events which received no agreement by one panel or the other have been generally discussed in the preceding context. This discussion has placed special emphasis upon a review of those events reflecting no agreement by both the panel of superintendents and the panel of business executives. Table 5 has shown that both

TABLE 5

SUMMARY OF THE ANALYSIS OF THE RESPONSES BY THE PANELS
INDICATING LESS THAN THREE OBSERVER AGREEMENT TO THE
CHRONOLOGY OF EVENTS IN DISTRICT 25 AND DISTRICT 87

Among School Superintendents	Among Business Executives	Among Both Panels of Experts
District 25 Events		
15 19 21 25 35 39 45 46 47 57 58 Total 11	3 6 8 12 18 19 20 21 22 27 29 30 35 Total 13	19 21 35 Total 3
District 87 Events		
11 13 28 31 50 57 Total 6	2 8 9 10 11 13 14 24 25 27 46 49 50 51 57 58 61 Total 17	11 13 50 57 Total 4

panels indicated no agreement on three events occurring in District 25. No agreement was reported on four events from District 87.

The following implications have been drawn from an analysis of the events:

Implication 1: It would be regarded as inappropriate to classify any of the events reported as "no agreement" by both panels as noncritical events (events 19, 21, 35--District 25; events 11, 13, 50, 57--District 87).

Five of the seven events dealt specifically with the concept of community involvement or attainment of community opinion. The current review of the literature has emphatically reported community involvement as an essential component in effectively dealing with declining enrollment issues.

The remaining two events were equally critical. Event 11 from District 87 pertained to the appointment of a Citizens Advisory Council and the establishment of its by-laws. Event 35 from District 25 reported the efforts of the District to update an enrollment projection survey on an annual basis. Again the need for involvement as described by both of those events was strongly recommended by the literature.

Implication 2: The business executives reported a significantly higher number of no agreement events than did the school superintendents.

Upon analysis of the thirty events reported as no agreement by the business executives to District 87 and District 25, only three of them (events 2, 9, and 10 specific to District 87) could

be regarded as noncritical to the topic of declining enrollment. All of the events would be regarded as critical to the operation of a school district. Of these thirty events, fifteen of them related directly to attainment of public opinion, public action, or public information. Six of the events related to the performance of functions by administrators, and six of the events referred to performance of functions by the boards of education.

The superintendents indicated no agreement on a total of seventeen events for the two districts. Eight of the events referred to attainment of public opinion, public action, or public information. Four of the events related to the performance of functions by administrators; one event referred to the function of a board of education.

Implication 3: The large number of events reported as no agreement dealing with public opinion, public action, and public information could be regarded as a point of caution in decision making by both panels regarding events occurring in the public schools.

The concept that the schools belong to the community has been a basic tenet upon which public education in the United States has been built. Boards of education have been elected by the people of a community to represent them in the legal governance of the schools. Current literature has repeatedly promulgated the essential nature of community involvement in the decision making process. For some administrators, such a degree of involvement by the public may begin a new era of management within the public schools.

Summary Regarding the Observers' Ratings
of Events to the Problem Solving Model

Some events contained more than one concept which could have motivated panel members to classify events as different steps. Naturally, further differences in responses could have been related to the semantic interpretation of the various steps of the model as well as to the semantic interpretation of the events themselves by the panels of observers. The individual experience background of each observer could tend to further promote divergence in the classification of events. It should also be noted that if some observers had less experience than others in using a problem solving model as an adjunct to decision making, such a variance could promote differences among observers. The difference could include the ability to abstract essentials from given events and to subsequently place events at different steps in a problem solving continuum.

The Concerns of Persons Involved
in the Closing of Schools

This section of the presentation and analysis of the data has specifically reviewed the concerns of those major groups of people most affected by the closing of schools. The groups of people most concerned have been designated for purposes of this discussion to include members of the boards of education, parents, principals, and teachers.

An attempt has been made to solicit the concerns from those persons who worked in or sent children to schools that were closed in a ratio equal to the declining student populations of the district.

The research information has indicated that student enrollments in each district decreased by approximately one-fourth from peak year to the fall of 1976. In accord with small sample statistical inference, the opinions of at least twenty-five parents and twenty-five teachers were obtained from each district. Of these total groups, approximately one-fourth of the parents and teachers were formally associated with schools that have been closed.

The discussion has contrasted the concerns of the groups as reported by the literature with the concerns reported by persons involved in the case study districts. In addition, the concerns of persons associated with a district have been contrasted to the concerns of persons associated with schools that have been closed within the district. Finally, analysis was made regarding the responses made by persons associated with each of the respective districts participating in the case study.

Analysis of the Concerns of Members of the Boards of Education

The literature indicated the following regarding the concerns of board members:

- Heavy amounts of pressure from "moving" areas with loss of credibility unless there is public understanding.
- New challenges to their leadership from discontented parent groups.
- Possibility of re-election defeat.
- Need to become familiar with new parents if the school board member has been elected from a precinct or ward and children are transferred across these political lines.

The possibility of having a well-established school board reputation shattered due to emotionalism.¹

From the experiences during the past three years, the Boards of Education of the districts participating in the case study should be regarded as experts among board members in the field of school closings. The personal and work schedules of these very active members of their communities have limited the opportunity to obtain opinions from all board members.

Eleven of the members of the boards have reported their major concerns regarding the closing of schools. Significant difference has been noted between what actual board members reported as major concerns and what the literature reported as major concerns of board members. The numbers of concerns expressed by the board members ranged from two responses to four responses for each respondent and a total of thirty-four responses were reported by both boards.

The responses of board members were obtained by telephone interviews. The following responses included those made by the board members interviewed:

1. Determine the significance of the actual financial crisis of the district (7 responses).
2. Determine, that in fact, the financial crisis was significant enough to warrant the closing of schools as opposed to operating schools with smaller enrollments (6 responses).

¹Katherine E. Eisenberg and William F. Keough, Declining Enrollment: What to Do (Arlington: American Association of School Administrators, 1974), p. 26.

3. Continue to provide the best possible program (6 responses).
4. Strive to remain aware of the feelings and attitudes of the community throughout the process (5 responses).
5. Determine a suitable use for a building consistent with the best interests of the community (4 responses).
6. Determine which schools to close (4 responses).
7. Determine what could be afforded in terms of essential education (2 responses).

It has been noted that some slightly greater concern regarding quality of program and need to remain aware of feelings and attitudes of the community was noted by board members of District 25. It should be concluded, however, that no significant difference existed between the over-all concerns expressed by members of the Board of Education of District 25 and the Board of Education of District 87. Each response was reported as a concern by at least one member of each of the respective boards. In addition, it would be inappropriate to make any assumption of difference based upon the small number of responses to any of the expressed concerns. The total number of responses reported by each board were approximately equal.

Analysis of the Concerns of Parents

Twenty-five parents were interviewed by phone from each district. Six persons from each group were parents of children who had been transferred from a school that the board had designated to be closed.

According to the literature the following concerns have been regarded as major concerns of parents:

Loss of involvement in their local school. Loss of established reputation, ability to influence and personal acceptance. Concerns for their children will be phrased by the following questions:

Does the new school offer a comparable or even better program?

Will my child have a longer bus ride?

If my child is ill during the school day, what provision will be made for transporting him home?

Will the "already-there" students be favored by the teachers and principal?

Will there be the same or similar social, ethnic, racial mix?

Is the lunch program similar?

Does the new school offer after-class activity programs; if so, is there a late bus?

Will this school offer the same extras--assembly programs, extra curricular activities, art, music, etc.

If my child is a "walker" will he or she have to cross any major physical barriers (main arteries, railroad tracks)?¹

The range of the number of responses made by the parent respondents was from one response to seven responses. A total of 154 responses were reported. A remarkable degree of similarity was noted between the response made by parents in the two districts and between the concerns reported by the literature. Only four of the responses related to the status of the parents to their schools and only one of the responses was from a parent whose child had been transferred from a closed building.

The responses of the parents have been reported in order of the frequency with which they were mentioned. Since the number

¹Ibid., p. 25.

of responses from a parent was usually three or less, no attempt has been made to establish priority to the responses as more or less of a concern to a parent. The responses include the following:

1. Quality of the instructional program of the new school (41 responses).
2. Quality of the facilities of the new school (24 responses).
3. Class size remain near the same (19 responses).
4. The distance from home to the new school (17 responses).
5. Can the child continue to walk or must a bus be used (14 responses)?
6. What precautions for safety have been taken regarding getting children to school for both "walkers" and "riders" (13 responses)?
7. How much longer would the child's day be increased by getting to and from school, or how long would he ride a bus (9 responses)?
8. No transportation of children into the district (7 responses)!
9. Loss of parental status in school affairs (4 responses).
10. No transportation of children out of the district (3 responses)!
11. Are there other minorities in the new schools (1 response)?

The responses from parents of both districts showed little significant difference. There was a slight indication of greater concern regarding the quality of the instructional program and the

transportation of children by one of the districts. In addition, there was some trend for greater concern by one district regarding the quality of facilities in the newer schools and also the transportation of students both into or out of the district.

The only concern that seemed less characteristic of parents of children who had been transferred from a closed school related to the question of busing. Less concern among this group would be logical since the question had, in fact, already been answered since their children had been assigned to new schools.

Analysis of the Concerns of Principals

The concerns of principals was ascertained through written request to the principal of each building in each of the districts. Eleven of the sixteen principals responded to the request from District 25 while three of the six principals responded from District 87.

The literature has reported that the major concerns of principals regarding the closing of schools include:

- Loss of jobs.
- Loss of staff with which they have built a working rapport.
- Loss of community acceptance.
- The necessity of beginning all over again to build reputation, influence and acceptance with a new faculty and community.
- The necessity of learning to work with new parents and a new student body.
- The necessity of having to establish themselves again as a good principal.¹

¹Ibid.

The number of responses made by a principal ranged from one response to five responses. A total of thirty-nine responses were received with five of them reported by principals from District 87. Some degree of similarity was noted between the responses made by the principals in the districts and the concerns expressed by the literature that eleven of the thirty-nine responses pertained to concerns reported by the literature.

The following responses appeared to be those reflecting agreement with the literature:

1. Loss of jobs (4 responses).
2. The necessity to begin again with new staff, students and parents (3 responses).
3. Loss of a working relationship with a staff (2 responses).
4. Concern regarding community support (2 responses).

It appears somewhat remarkable that so few concerns were expressed regarding the critical issue of loss of jobs. It could perhaps be assumed that there is a strong self confidence level among administrators regarding the need for their talents. Such an attitude would appear to be significantly appropriate to persons effectively involved in leadership roles.

The following concerns were those reported in contrast to the reported literature:

1. Loss of staff morale (5 responses).
2. Successful integration of students from a closed school (5 responses).

3. Concern regarding the adjustment of transferred teachers into existing team structures (3 responses).
4. Division or "watering down" of the quality of the instructional program (2 responses).
5. Difficulty in developing long-range plans (2 responses).
6. The loss of good, younger teachers (2 responses).
7. The allocation of materials and equipment from closed buildings (2 responses).
8. Constraints upon the budget (2 responses).
9. The use of closed buildings (1 response).
10. Early reassignment of teachers to be transferred (1 response).
11. Increased busing and lunch room problems (1 response).
12. Assignment of too many children to a building (1 response).

The limited number of responses from principals in District 87 has precluded the opportunity to suggest any trend for differences in responses between the two districts. It has been noted that responses regarding teacher morale, teacher adjustment to transfer, and other teacher concerns occupied a high incidence (11 responses) of concern among the principals. Such an expression of concern would tend to suggest that a strong relationship should exist between a leader and concern for those whom he leads.

Analysis of the Concerns of Teachers

The principal of each of the buildings in each district was asked randomly to solicit responses to the question of concern

from a specified number of teachers in the building. Formal written requests were presented to teachers in all buildings in numbers sufficient to produce at least twice the number of responses to be used in the sample. Appropriate measures were conducted to assure anonymity of the respondents. Responses were received from teachers in fifteen of the sixteen schools in District 25 and from all of the schools in District 87. In order to further assure a representative sample of responses, twenty-five responses from the more than fifty responses received from each district were selected by random procedures for purposes of this study. Attention was given, however, to maintain at least six responses of teachers from each district who had worked in buildings that were closed.

The concerns reported by the literature as the major concerns of teachers include the following:

Loss of jobs.

Loss of established reputation, influence, personal acceptance which has been built over the years in the old school.

Acceptance of themselves, their teaching style, and special abilities by a new principal, new faculty and new community. The necessity of having to "psyche out" a new system.¹

The number of responses of concern indicated by teachers ranged from two responses to six responses and a total of 154 responses were reported by the teachers from both districts.

Only twenty responses showed agreement with the literature regarding the major concerns of teachers. Responses concerning loss of jobs were made by eleven persons, and nine teachers indicated

¹Ibid.

concern regarding readjustment or acceptance by a new faculty, principal, or community. There was no indication of significance pertaining to the responses of teachers from either district; however, there was a trend for significance in the responses of teachers who had worked in schools that had closed regarding the readjustment issues. Four of the nine responses to that area were made by teachers who had been transferred.

The diversity of concerns reported by teachers should be noted as a singular concern. Perhaps some of the concerns specifically expressed could have been placed in the somewhat general areas reported by the literature; however, in order to provide the most meaningful information to others, the specific responses of the teachers have been discussed in this dissertation.

The concerns expressed by teachers include the following:

1. Increased class size and split classes (31 responses).
2. Reduction in force procedures (13 responses).
3. Morale and tension among staff (12 responses).
4. Loss of neighborhood schools (11 responses).
5. Busing (9 responses).
6. Reassignment of teachers in an appropriate manner (9 responses).
7. Loss of special services including social work, art, music, and others (9 responses).
8. Adjustment of students to the new schools (9 responses).
9. Loss of enrichment and remedial programs (8 responses).

10. Loss of quality of instruction (7 responses).
11. Distribution of equipment, supplies, and teaching materials from closed schools (5 responses).
12. Use of empty buildings (3 responses).
13. Welfare of those released (2 responses).
14. Other, including loss of state funds, inadequate teacher support, insufficient teacher retraining, inadequate preparation time or lack of released time, and lack of compensation for moving (5 responses).

Two of the areas of concerns expressed by the teachers appeared to have greater significance to teachers who had been transferred. Those areas related to the concern for the adjustment of students in the new schools and for the loss of special services. In each case four of the five responses were from transferred teachers. Perhaps it could be assumed that, since transferred teachers were tenured teachers, greater significance may be placed upon adjustment and special services to students when personal security issues are more definite.

The areas indicated as the highest concerns, increased class size and split classes, were the only concerns expressed by the teachers that were more specific to District 87 than to District 25. This area was expressed as a concern by twenty-four of the respondents from District 87. It may be further noted that of the seven responses regarding quality of education, five of the respondents also noted class size as a concern. Since both concerns were listed by the same respondents, it may be assumed that the

concerns were regarded as discrete concerns. Such an observation lends continued support to the unresolved relationship between class size and quality of instruction.

The second area of concern reported by the teachers, reduction in force, incorporated a wide variety of concerns relating to the reduction in force issue. Included among the specific concerns expressed were reports of lacking concern by the unions for non-tenured teachers, dismissing of good, young teachers, "bumping" of tenure teachers, and maintaining the best teachers regardless of tenure or seniority. These concerns were frequently expressed in the literature as concerns of parents, boards of education, and administrators but rarely, if ever, expressed as concerns of organized teacher groups.

Summary of the Concerns of Selected Groups

The preceding discussion has been presented to provide an opportunity for the concerns of board members, parents, administrators, and teachers specific to Cook County, Illinois, to be contrasted with the concerns of similar groups as expressed in the literature. It would appear that the concerns of each group, with perhaps the exception of the parents, may be regarded as far more diverse and comprehensive than those expressed by the literature. The responses of the groups, specifically the board members, parents, and administrators would appear to be significantly less self centered than the concerns reported by the literature for those groups. Finally, it could be assumed that little significance should be

placed upon the tenet that a significant difference existed between the concerns of teachers who have worked in schools that have been closed or by parents whose children have attended schools that have been closed than from their respective counterparts.

Analysis of Fiscal Conditions, Sources of Revenues,
Enrollment and Staffing Statistics, and
Plant Utilization Associated
With Declining Enrollment

The following presentation has been made with the intention of sharing some of the insights gathered from the case study process. Much of this information has been alluded to and has been otherwise essential in the preparation of the "Reconstruction of Events;" however, since this type of data has a profound impact for other districts that may be confronted by the problems of declining enrollment and subsequent school closings, a more in-depth analysis has been provided.

Information presented in this section has usually been presented for at least the twelve years preceding the fall of 1977. The same rationale has been employed throughout the development of this analysis section. Information relative to the peak year of enrollment, which was 1969 in both districts, has been contrasted to information for four years prior to peak enrollment year and to four years after the peak enrollment year. In addition, information has been presented for both the fifth and sixth years after the peak enrollment year since these were the years in both Districts that represented crucial fiscal crisis and the subsequent closures of schools.

Analysis of Fiscal Conditions
and Sources of Revenue

Most of the information reported as year-end fiscal conditions has been information compiled from the official audit reports of the school districts participating in the case study. This information was preferred for use even though information from other sources including the respective school budgets had been reviewed. The audit information was selected as most preferred since it represented the most accurate information regarding both revenues and expenses as well as a source of information available in both districts for a longer historical period.

Tables 6 and 7 have presented a concise review of information regarding total revenues, total expenses, year-end assets, assessed valuation, and per student costs for each district for the past twelve-fiscal years. In addition, information regarding expenses has been broken down to show expenses specific to the educational fund. Furthermore, per student costs have been presented both on the basis of expenditures from the educational fund and on the basis of total expenditures.

The per student costs have been further based upon September 30 enrollments since for purposes of this study, information representative of membership has been regarded as more exemplary of realistic expenditures than were costs based upon attendance. Revenues and expenses in the bond and interest and other funds vary from year-to-year for bookkeeping reasons. They have not been included here because they would tend to distort the fiscal picture.

TABLE 6

SUMMARY OF DISTRICT 25
YEAR-END FISCAL CONDITIONS

Year	Total Revenues	Expenses		Year-End Assets	Assessed Valuation	Per Student Cost	
		Educational Fund	Total Expenses			Educational Fund	Total Expenses
1976-77	11,726,780	9,522,055	11,836,635	(109,855)	249,193,960	1260	1576
1975-76	11,987,522	10,068,743	12,498,833	(511,311)	203,697,058	1243	1543
1974-75	11,938,269	9,214,499	11,729,375	208,894	202,620,528	1082	1377
1973-74	13,762,785	7,943,813	10,538,379	3,224,406	203,213,827	876	1162
1972-73	7,229,309	7,245,379	9,566,176	(2,336,867)	210,290,635	764	1009
1971-72	12,797,066	6,535,044	8,786,458	4,010,608	205,446,126	670	901
1970-71	7,915,684	7,075,251	10,647,030	(2,731,345)	196,828,533	705	1061
1969-70	12,509,532	6,707,352	10,291,346	2,218,186	187,353,588	666	1022
1968-69	6,700,380	5,666,124	8,180,326	(1,479,945)	170,049,822	575	831
1967-68	7,304,373	4,741,027	5,537,195	1,767,178	160,598,991	503	588
1966-67	4,342,084	3,989,882	4,806,081	(463,997)	154,035,178	434	523
1965-66	4,197,611	3,329,718	4,022,878	174,732	144,225,903	396	478

TABLE 7

SUMMARY OF DISTRICT 87
YEAR-END FISCAL CONDITIONS

Year	Total Revenues	Expenses		Year-End Assets	Assessed Valuation	Per Student Cost	
		Educational Fund	Total Expenses			Educational Fund	Total Expenses
1976-77	6,745,545	3,893,955	5,202,190	1,543,355	135,407,866	1579	2109
1975-76	7,927,166	4,474,823	6,930,398	996,768	131,814,455	1659	2569
1974-75	7,818,827	3,661,536	5,651,323	2,167,504	129,318,543	1267	1956
1973-74	4,513,274	3,638,831	5,010,477	497,202	131,651,249	1221	1681
1972-73	4,412,296	2,995,232	4,220,510	191,785	124,352,745	946	1334
1971-72	6,461,551	3,476,016	5,263,949	1,197,601	119,013,224	1052	1593
1970-71	6,519,298	2,508,322	5,746,565	772,733	114,776,573	736	1687
1969-70	7,365,327	2,020,977	3,156,737	4,208,589	107,539,969	588	918
1968-69	2,950,147	1,866,831	2,536,367	413,779	96,720,085	562	763
1967-68	2,763,904	1,800,435	2,063,521	700,383	92,272,184	547	627
1966-67	2,234,565	1,563,906	1,900,274	344,291	87,777,739	476	578
1965-66	3,033,266	1,580,371	2,343,780	689,486	86,948,853	484	718

It should further be noted that a significant variation has often been indicated for subsequent years in the total revenues column. This variation has routinely been related to the variation in collection of taxes as may be associated with the variation that has existed in distribution of real estate tax bills by the county assessor. It must be noted that both districts have always maintained a balanced budget.

Tables 8 and 9 have presented comparative fiscal information pertaining to the case study districts over a twelve-year period of time. Increases and decreases have been calculated and presented in major revenue accounts as well as in some major expense accounts. Further, comparative information has been shown regarding year-end assets as well as for assessed valuation of the school districts. Finally, per student costs have been calculated based upon both the total expenditures from the educational fund and also from the total expenditures of the districts.

An analysis of Tables 8 and 9 have been presented so that the specific relationships regarding the fiscal conditions within both districts may be more readily available. It should be noted that the revenues in the education fund for both districts has continued to increase at an extraordinary rate for the selected years. The rate of increase of revenue in the educational fund for District 87 has increased at more than twice the rate of District 25 for the years 1974 through 1976, while the overall rate of increase between the two districts for the twelve-year period has been relatively equal. This relationship is undoubtedly correspondent to

TABLE 8

COMPARISON OF DISTRICT 25 FISCAL
INCREASES AND DECREASES FOR SELECTED YEARS

	1969-1974 6-Year Change Percent	1969-1975 7-Year Change Percent	1969-1976 8-Year Change Percent	1965-1976 12-Year Change Percent
<u>Revenues</u>				
Educational Fund	+ 19.8	+ 19.6	+ 16.9	+ 196.6
State Aid	+ 48.2	+ 61.4	+ 55.4	+ 306.5
Local Taxes	- 14.4	- 19.3	- 13.6	+ 118.0
Building Fund	- 9.6	- 8.2	- 13.6	+ 198.9
Total Revenues	- 4.6	- 4.2	- 6.3	+ 179.4
<u>Expenses</u>				
Educational Fund	+ 37.4	+ 47.5	+ 42.0	+ 186.0
Building Fund	+ 27.9	+ 8.4	- 1.4	+ 173.7
Transportation Fund	+ 34.7	+ 75.1	+ 64.6	+ 224.6
Total Expenses	+ 14.0	+ 21.4	+ 14.5	+ 194.2
Year-End Assets	- 90.6	- 123.1	- 104.9	- 162.9
Assessed Valuation	+ 8.1	+ 8.7	+ 33.0	+ 72.8
Per Student Cost Based Upon:				
Educational Fund	+ 62.5	+ 86.6	+ 89.2	+ 218.2
Total Expenditure	+ 25.8	+ 51.0	+ 54.2	+ 229.7

TABLE 9

COMPARISON OF DISTRICT 87 FISCAL
INCREASES AND DECREASES FOR SELECTED YEARS

	1969-1974 6-Year Change Percent	1969-1975 7-Year Change Percent	1969-1976 8-Year Change Percent	1965-1976 12-Year Change Percent
<u>Revenues</u>				
Educational Fund	+ 39.8	+ 53.9	+ 53.3	+ 188.0
State Aid	+ 7.6	- 15.5	- 7.3	+ 129.0
Local Taxes	- 1.8	- 0.7	+ 3.0	+ 86.9
Building Fund	+ 36.3	+ 95.1	+ 125.0	+ 26.2
Total Revenues	+ 6.2	+ 7.6	- 8.4	+ 55.0
<u>Expenses</u>				
Educational Fund	+ 81.2	+ 121.4	+ 92.8	+ 146.4
Building Fund	+ 67.8	+ 89.3	+ 49.9	- 8.0
Transportation Fund	+ 6.6	+ 47.8	+ 56.6	+ 185.6
Total Expenses	+ 79.0	+ 119.5	+ 64.8	+ 122.0
Year-End Assets	- 48.5	- 76.3	- 63.3	- 49.1
Assessed Valuation	+ 20.2	+ 23.0	+ 20.6	+ 84.4
Per Student Cost Based Upon:				
Educational Fund	+ 115.5	+ 182.1	+ 168.5	+ 226.2
Total Expenditure	+ 113.1	+ 179.8	+ 129.7	+ 193.7

the extreme differences that have existed especially since 1969 in the rate of assessed valuation supporting each child in the two districts. For the selected years of 1969, 1974, 1975, and 1976 the assessed valuation per child in District 25 was approximately 17,167; 18,623; 23,798; 25,141; and 33,186 dollars while in District 87 the rates for the respective years were 26,638; 31,301; 44,762; 48,874; and 54,909 dollars.

State aid has provided District 25 with a significant source of indemnifying funds while the decrease in state aid has presented significant concerns for District 87. A point of particular interest in both districts has been a noted decrease in the gross amount of local tax support. The effect of a quadrennial reassessment has been experienced in each district during the selected years. The effect of the rate referendum passed in District 25 in 1976 would not be reflected on these Tables. The differences between degrees of increase in the building fund revenue would also be related to the assessed valuation per child as well as to the building programs which continued in both districts until 1970 and 1971.

It should be noted that in 1976 both districts experienced a near equivalent decrease in the receipt of total revenues. It was at that time that both districts had experienced a twenty-six to twenty-eight percent decrease in enrollment from the year of their peak enrollments. The extreme variance between the increase shown in total revenue over the twelve-year period undoubtedly relates to the significant differences in community development as related

to assessed valuation per child and also the extraordinary growth period reflected by District 25.

As has been generally accepted, an overwhelming portion of the educational fund expenditures has been required for the payment of salaries. The difference in the rate of increase in this fund between the two districts may be related to the fact that District 87 continued to add instructional personnel until the employment of the new superintendent in September 1973 while District 25 did not increase personnel after the peak enrollment year of 1969. In addition, it may be assumed that the costs of operating mandated special education programs and bilingual programs may represent a greater financial burden to a lower enrollment, primarily industrial, blue collar district than to a larger enrollment, primarily technical, white collar community.

The differences in the rates of building fund increases for the selected years may be associated with the more expensive building project, including a comprehensive junior high school in District 87. In addition, a difference may be attributed to the costs of maintenance of older buildings and the related employment of an appreciably higher ratio of noncertified personnel in District 87 (refer to Table 19, page 160).

The rates of increase shown in the transportation funds have been considerably higher for District 25 than for District 87. The difference may logically be attributed to the fact that District

87 has historically transported a larger number of students proportionately to District 25 both within the district and to special education programs. This factor would tend to reflect less change over the twelve-year period. Another factor of note would be that as the larger number of students in District 25 began junior high school, the associated transportation costs would have spiraled correspondingly (refer to Table 12, page 151).

The trend indicated by the reported year-end assets between 1975 and 1976 probably reflect the affect of the massive reduction in force accomplished within both districts during those fiscal years. It should also be noted that although the rates of increased assessed valuation were similar for the eight and twelve-year periods, a remarkable difference has continued to exist between the amount of assessed valuation per child in each district.

The per student costs have consistently been notably higher in District 87 than in District 25 as reported on Tables 8 and 9. It is significant to note, however, that the rate of increase for each district based upon the educational funds has been reported as near equivalent over the twelve-year period. Such a dramatic increase may be attributed to the increase in professional salaries, repeated years of double digit inflation, and the impact reflected throughout the national economy.

A summary of fiscal conditions and sources of revenue.

An analysis of the costs of education would appear to be more logically made based upon student membership than upon daily attendance figures. Such a recognition has provided two districts having

experienced remarkable enrollment decline with a more equitable withdrawal of state financial support than would have support based strictly upon calculation of average daily attendance. A bulk of the costs of operating a school district may not be adjusted on a month-to-month basis as might other enterprises since the costs of personnel and operations remain consistent on a contractual year basis.

Although revenues increased by extraordinary amounts in both districts during the twelve-year period, the rate of local tax support decreased almost consistently during 1974, 1975, and 1976 as compared to the peak enrollment year of 1969.

It has been further noted that although both districts reflect wide differences in terms of size of enrollment, rates of revenues, expenditures, and assessed valuation per student, a near-equivalent decrease in rate of receipt of total revenue was noted in 1976. It was in 1976 that both districts had experienced enrollment decline from peak year of between twenty-six and twenty-eight percent.

The effects of the massive reduction in force efforts by both districts was reflected in a slight reversal of the negative increase of year-end assets reported for the 1976 fiscal year. It may be further noted that although the two districts reported vastly different per pupil costs over the twelve-year period, a remarkable similarity in the rate of increase of per pupil costs was shown for each district based upon expenditures from the education fund. District 25 reported a per pupil increase of 218 percent while

District 87 indicated an increase of 226 percent over the same twelve-year period. Such an explosive rate of increase will undoubtedly continue to plague boards of education, school administrators, and communities at large unless remarkable socio-economic and political reversals are made. Such reversals might include a stringent "back to basics" approach by boards of education, a reversal of federally mandated extraordinarily expensive special programs for the handicapped, the foreign speaking and other minorities, or a trend for stabilization of the national economy.

Analysis of Enrollment and Staffing Statistics

This section has provided a detailed historical analysis of the rates of enrollment increase and decline in each district. The rates of increase and decline are noted both in terms of actual attendance and in terms of deviation for selected years from the peak enrollment year of 1969. Furthermore, enrollment trends are analyzed both by grades and by buildings. Finally, staffing trends have been reviewed for the twelve-year period and analysis of enrollment trends has been presented.

It must be noted that the enrollment figures reported for District 25 have been based upon September enrollment statistics while the figures for District 87 have been based upon June enrollment statistics. During recent years, attendance statistics for both September and June were available in District 87. Inspection suggested that the enrollments were basically equivalent. Since availability of statistics for the full twelve-year period was

available for only June statistics, the use of statistics drawn from the different months for the two districts was regarded as the more suitable alternative for purposes of this presentation.

Table 10 and Table 11 have been developed to present enrollment statistics for the case study districts over a twelve-year period of time. Enrollment information by grade has been presented for selected years.

Inspection of Tables 10 and 11 has indicated a trend for significant increase of service to self-contained special education students in both districts notwithstanding the significant decrease in overall enrollment. A trend for a significant decrease in enrollment particularly in the primary and intermediate grades was noted in both districts by 1974, with some trend apparent in District 87 in 1969. It was further noted that a possible trend for a reduced enrollment in first grade was observed by District 25 personnel in 1970.

Tables 12 and 13 have provided an indication of an increase or decrease by percent for each grade based upon deviation from the peak enrollment year of 1969. The extraordinary increase in numbers of self-contained special education children served in District 87 should be noted. In addition, the difference in total enrollment over the twelve-year period noted between the districts has characterized the historical growth patterns of the districts. District 87 showed a decrease between 1965 and 1976 of greater than twenty-four percent which would be indicative of a district

TABLE 10

SUMMARY OF DISTRICT 25 ENROLLMENT
BY GRADE FOR SELECTED YEARS

Grade	1965-66	1969-70	1974-75	1975-76	1976-77
Special Education	85	98	204	222	217
K	1269	1156	805	842	708
1	984	1034	776	741	750
2	987	1113	871	744	727
3	941	1108	832	866	716
4	901	1159	901	816	850
5	800	1123	987	889	801
Total	<u>5967</u>	<u>6791</u>	<u>5376</u>	<u>5120</u>	<u>4769</u>
6	841	1163	972	964	864
7	817	1073	1065	952	944
8	776	1029	1101	1064	930
Total	<u>2434</u>	<u>3269</u>	<u>3138</u>	<u>2980</u>	<u>2738</u>
Total Enrollment	8401	10060	8514	8100	7507

TABLE 11

SUMMARY OF DISTRICT 87 ENROLLMENT
BY GRADE FOR SELECTED YEARS

Grade	1965-66	1969-70	1974-75	1975-76	1976-77
Special Education	38	95	185	186	169
K	475	447	292	226	214
1	370	355	262	270	206
2	365	337	245	241	256
3	373	357	262	252	215
4	352	389	282	261	246
5	315	377	337	279	250
Total	<u>2288</u>	<u>2357</u>	<u>1865</u>	<u>1715</u>	<u>1556</u>
6	330	363	316	333	270
7	333	366	331	318	325
8	313	349	377	331	315
Total	<u>976</u>	<u>1078</u>	<u>1024</u>	<u>982</u>	<u>910</u>
Total Enrollment	3264	3435	2889	2697	2466

TABLE 12

SUMMARY OF DISTRICT 25
6-7-8 AND 12-YEAR ENROLLMENT CHANGES BY GRADE

Grade	1969-1974 6-Year Change Percent	1969-1975 7-Year Change Percent	1969-1976 8-Year Change Percent	1965-1976 12-Year Change Percent
Special Education	+ 108.2	+ 126.5	+ 121.4	+ 155.3
K	- 30.4	- 27.2	- 38.7	- 44.2
1	- 24.9	- 28.3	- 27.5	- 23.8
2	- 21.7	- 33.1	- 34.7	- 26.3
3	- 24.9	- 21.8	- 35.2	- 23.9
4	- 22.3	- 29.6	- 26.7	- 5.7
5	- 12.1	- 20.8	- 28.7	0.0
Total	- 20.8	- 24.6	- 29.8	+ 20.1
6	- 16.4	- 17.1	- 25.7	+ 2.7
7	- 0.7	- 11.3	- 11.7	+ 15.9
8	+ 7.0	+ 3.4	- 9.6	+ 19.8
Total	- 4.0	- 8.8	- 16.2	+ 12.5
Total Change	- 15.4	- 19.5	- 25.6	- 10.6

TABLE 13

SUMMARY OF DISTRICT 87
6-7-8 AND 12-YEAR ENROLLMENT CHANGES BY GRADE

Grade	1969-1974 6-Year Change Percent	1969-1975 7-Year Change Percent	1969-1976 8-Year Change Percent	1965-1976 12-Year Change Percent
Special Education	+ 94.7	+ 95.8	+ 77.9	+ 344.7
K	- 34.7	- 49.4	- 52.1	- 54.9
1	- 26.2	- 23.9	- 42.0	- 44.3
2	- 27.3	- 28.5	- 24.0	- 29.9
3	- 26.6	- 29.4	- 39.8	- 42.4
4	- 27.5	- 32.9	- 36.8	- 30.1
5	- 10.6	- 26.0	- 33.7	- 20.6
Total	- 26.4	- 27.2	- 34.0	- 32.0
6	- 13.0	- 8.3	- 25.6	- 18.2
7	- 9.6	- 13.1	- 11.2	- 2.4
8	+ 8.0	- 5.1	- 9.7	+ 0.6
Total	- 5.0	- 8.9	- 15.6	- 6.7
Total Change	- 15.9	- 21.5	- 28.2	- 24.4

that had been hovering at near peak enrollment for a number of years. The decrease profile shown for District 25 appears to have indicated a rapid period of explosive growth followed by an almost similar period of decline.

Tables 14 and 15 have presented enrollment statistics for buildings in District 25 and District 87 respectively. It must be noted that special education enrollment by building has not been reported for District 25. In addition, the Wolf Road Annex was a temporary facility rented by District 87. Interpretation of Tables 14 and 15 should be done with caution unless reference has been made to the "Reconstruction of Events" presented in Chapter III for each district. The increased enrollment in each building has usually been associated with the reassignment of children from closed facilities. Definite trends have been indicated regarding decreased enrollment in numerous schools in both districts. Identification of the specific buildings that might have been considered as possible unnecessary facilities has been discussed in a subsequent section with the presentation of plant utilization information.

Tables 16 and 17 have been presented to provide a resume of the percentages of decrease and increase in building enrollments as compared to the peak enrollment year of 1969. The same cautions presented regarding Tables 14 and 15 are applicable to the interpretation of Tables 16 and 17. It should be noted that a remarkable

TABLE 14

SUMMARY OF DISTRICT 25 ENROLLMENT
BY SCHOOL FOR SELECTED YEARS

School	1965-66	1969-70	1974-75	1975-76	1976-77
Berkley	• • •	• • •	366	382	361
Dryden	383	478	415	396	393
Dunton	264	296	338	321	309
Dwyer	249	302	• • •	• • •	• • •
Greenbrier	538	532	382	369	359
Ivy Hill	• • •	608	426	393	390
Kensington	641	602	349	304	298
Miner	982	983	753	698	604
North	445	428	305	299	• • •
Olive	315	479	416	389	483
Park	609	526	376	356	332
Patton	230	439	277	243	217
Rand	• • •	485	744	755	739
Ridge	491	487	392	375	360
South	755	893	860	793	730
Thomas	697	908	781	732	666
Westgate	489	421	398	380	377
Wilson	481	500	320	268	247
Windsor	747	595	412	423	426
Total Enrollment	8316	9962	8310	7878	7291

TABLE 15

SUMMARY OF DISTRICT 87 ENROLLMENT
BY SCHOOL FOR SELECTED YEARS

School	1965-66	1969-70	1974-75	1975-76	1976-77
Field	237	235	161	127	. . .
Franklin	213	169	143	147	. . .
Jefferson	425	527	352	331	331
Longfellow	252	248	216	201	190
MacArthur	526	608	403	355	390
Northlake	. . .	. . .	341	335	295
Riley	309	295	341	320	362
Sunnyside	408	400	410	408	421
Twain	433	445	273	246	231
Whittier	461	437	249	227	246
Wolf Road Annex (Spec. Education)	. . .	71	. . .	. . .	. . .
Total Enrollment	3264	3435	2889	2697	2466

TABLE 16

SUMMARY OF DISTRICT 25
6-7-8 AND 12-YEAR ENROLLMENT CHANGES BY SCHOOL

School	1969-1974 6-Year Change Percent	1969-1975 7-Year Change Percent	1969-1976 8-Year Change Percent	1965-1976 12-Year Change Percent
Berkley	. . .	. . .	. . .	. . .
Dryden	- 13.2	- 17.2	- 17.8	+ 2.6
Dunton	+ 14.2	+ 8.4	+ 4.4	+ 17.0
Dwyer	. . .	. . .	. . .	. . .
Greenbrier	- 28.2	- 30.6	- 32.5	- 33.3
Ivy Hill	- 29.9	- 35.4	- 35.9	. . .
Kensington	- 42.0	- 49.5	- 50.5	- 53.5
Miner	- 23.4	- 29.0	- 38.5	- 38.5
North	- 28.7	- 30.1	. . .	. . .
Olive	- 13.1	- 18.8	+ 0.8	+ 53.3
Park	- 28.5	- 32.3	- 36.9	- 45.5
Patton	- 36.9	- 44.6	- 50.6	- 5.6
Rand	+ 53.4	+ 55.7	- 52.4	. . .
Ridge	- 19.5	- 23.0	- 26.2	- 26.7
South	- 3.7	- 11.2	- 18.2	- 3.3
Thomas	- 14.0	- 19.4	- 26.6	- 4.4
Westgate	- 5.5	- 9.7	- 10.4	- 22.9
Wilson	- 36.0	- 46.4	- 50.6	- 48.6
Windsor	- 30.7	- 28.9	- 28.4	- 43.0
Total Change	- 16.6	- 20.9	- 26.8	- 12.3

TABLE 17

SUMMARY OF DISTRICT 87
6-7-8 AND 12-YEAR ENROLLMENT CHANGES BY SCHOOL

School	1969-1974 6-Year Change Percent	1969-1975 7-Year Change Percent	1969-1976 8-Year Change Percent	1965-1976 12-Year Change Percent
Field	- 31.5	- 46.0	. . .	. . . .
Franklin	- 15.4	- 13.0	. . .	. . . .
Jefferson	- 33.2	- 37.2	- 37.2	- 22.1
Longfellow	- 12.9	- 19.0	- 23.4	- 24.6
MacArthur	- 33.7	- 41.6	- 35.8	- 25.8
Northlake	. . .	. . .	. . .	. . . .
Riley	+ 15.6	+ 8.5	+ 22.7	+ 17.1
Sunnyside	+ 2.5	+ 2.0	+ 5.2	+ 3.2
Twain	- 38.6	- 44.7	- 48.1	- 46.6
Whittier	- 46.6	- 43.0	- 48.0	- 43.7
Total Change	- 15.9	- 21.5	- 28.2	- 24.4

degree of similarity existed between the rates of decrease within the total population for both Districts between the years of 1974, 1975, and 1976 as compared to 1969.

A wide variety of staffing information has been presented on Tables 18 and 19. The "Total" column under "Certificated Personnel" on Table 18 should be regarded as equivalent to the "Number of Certificated Personnel" column, under the "Certificated Personnel" column, of Table 19. The "K-8" column, under "Certificated Personnel" of Table 18 represents the number of persons working directly with the students in addition to classroom teachers, such as teachers of art, music, and industrial arts but excludes building administrators. "District Wide Personnel" in Table 18 includes central administrators and those instructional personnel who serve the district at large. These two types of information have been presented on Table 18 in lieu of the availability of the number of direct classroom teachers throughout the full twelve-year period.

Tables 18 and 19 have further reported the number of non-certificated personnel employed by each District. Records regarding this area were unavailable for District 87 for the years preceeding 1971 as was the case for information presented in the "Total Personnel" column, on Table 19. In addition, the total enrollment by district has been reported for the twelve-year period and student-teacher ratios have been calculated.

It may be noted as significant that District 87 appears to have employed a larger number of noncertificated personnel than

TABLE 18

SUMMARY OF DISTRICT 25
STAFFING BY PERSONNEL CATEGORY

Year	Certificated Personnel			Noncertificated Personnel	Total Personnel	Enrollment	Student-Teacher Ratio	
	K-8	District Wide	Total				Total Certificated Personnel	K-8 Personnel
1976-77	339.0	54.0	414.0	133.5	547.5	7509	18.1	22.1
1975-76	399.7	59.8	481.5	136.5	618.0	8100	16.8	20.3
1974-75	403.1	75.0	500.1	136.5	636.6	8514	17.0	21.1
1973-74	389.3	64.8	476.1	127.5	603.6	9062	19.0	23.3
1972-73	393.8	50.4	466.2	127.5	593.7	9477	20.3	24.0
1971-72	389.0	45.0	456.0	127.5	583.5	9747	21.4	25.0
1970-71	425.5	45.0	492.5	127.5	620.5	10031	20.4	23.6
1969-70	420.0	45.0	485.0	124.5	609.5	10060	20.7	24.0
1968-69	380.0	45.0	445.0	117.5	652.5	9843	22.1	25.9
1967-68	352.0	45.0	417.0	117.5	534.5	9412	22.6	26.7
1966-67	305.0	45.0	372.0	114.5	486.5	9174	24.7	30.0
1965-66	297.0	22.0	341.0	131.0	472.0	8401	24.6	28.3

TABLE 19

SUMMARY OF DISTRICT 87
STAFFING BY PERSONNEL CATEGORY

Year	Certificated Personnel		Noncertificated Personnel	Total Personnel	Enrollment	Student-Teacher Ratio	
	Number Certificated Personnel	Classroom Teachers				Total Certificated Personnel	Classroom Teachers
1976-77	129.0	90.5	78.0	207.0	2466	19.1	27.2
1975-76	168.0	118.0	97.8	265.8	2697	16.0	22.8
1974-75	179.0	128.0	89.0	268.0	2889	16.1	22.6
1973-74	179.5	128.5	80.0	258.5	2980	16.6	23.2
1972-73	173.0	128.5	48.0	230.0	3163	18.3	24.6
1971-72	168.0	127.5	71.0	239.0	3303	19.8	25.9
1970-71	168.0	124.0	. . .	. . .	3405	20.3	27.5
1969-70	143.0	120.0	. . .	. . .	3435	24.0	28.6
1968-69	138.0	117.0	. . .	. . .	3321	24.0	28.4
1967-68	135.0	116.0	. . .	. . .	3287	24.3	28.3
1966-67	138.0	111.0	. . .	. . .	3284	23.8	29.6
1965-66	138.0	106.0	. . .	. . .	3264	23.6	30.8

has District 25 in relationship to the respective numbers of students enrolled in the district. It has been further important to note that District 25 employed only two and one-half more noncertificated personnel than were employed in 1965-66. District 87 has reduced noncertificated personnel to a level near that reported for 1971. It would appear highly probable that the noncertificated personnel total reported for 1972 was inaccurate. The information was, however, taken from official district housing reports.

Upon review of information available from the "Reconstruction of Events" and other data, it may be assumed that districts experiencing severe declining enrollment do not use classroom aides as a method of serving larger numbers of children. The data does support the use of aides in the areas of health and library or media services. A tendency has been indicated to retain custodial personnel under district employment to service their rented facilities. Furthermore, the addition of office personnel appears to have been maintained at a minimal level despite the volume of additional paperwork required by federal, state, and county branches of education.

An inspection of the information reported under student-teacher ratio would suggest that despite the large reduction in force efforts of both districts, enrollment ratios have not returned to the pre-1970 levels. This trend has been noted as representative of both districts.

Both districts have reported an intent to attempt to keep classroom enrollments under thirty or thirty-five children. Neither district had restrictive limits regarding class size as part of the bargaining contracts. Even though the 1976-77 overall student-teacher ratios were lower than the pre-1970 levels, it has been concluded that the formation of multi-age classes is a reality of declining enrollment. Finally, it must be concluded that increased numbers of children must be served in regular classrooms since specific legislation limits the numbers of children that may be served in special classrooms. Further legislation has also mandated the maintenance of bilingual and other programs for the minority population.

An analysis of the data has suggested the following sequence for implementation of reduction in force:

1. Reduction of administrators by combining smaller buildings under the supervision of one person.
2. Reduction of the number of psychologists, social workers, speech teachers, and counselors, or the purchase of such services from a special education regional program.
3. Reduction of nursing and library personnel with the use of noncertificated aides.
4. Reduction of special area teachers by reducing the amount of time special subjects are taught by specialists.
5. Reduction in the number of classroom teachers by closing schools and consolidating student enrollment.

6. Reduction in the number of classroom teachers by multi-age grouping such as combining grade levels.

Summary of enrollment and staffing statistics. Included among the assumptions supported by the analysis of enrollment and staffing statistics has been an expectation for the continued extraordinary increase in the growth of special education programs nonproportionate to the rate of decline of the total population. Case study datum supported such a rate of growth ranging from 77 percent to 121 percent since 1969. Recent federal legislation shall undoubtedly motivate such increases to continue.

It has been further suggested that mild school closure has been initiated after a decline in enrollment of between 16 percent and 22 percent had been experienced. Mild school closure would refer to closing of one or more buildings of ten or fewer rooms. Moderate closing, the closing of one or more buildings of fifteen or fewer rooms, has been indicated when enrollment had declined by 26 percent to 28 percent. These suggestions have been presented for possible further study since they were supported by this research.

Boards of education should not yield the issue of class size restriction as a point of negotiation. Board policy or minimally formal administrative procedure should be developed to specify reduction in force procedures.

Despite large reduction in force efforts, it is unlikely that the certificated personnel-student ratio will return to a

level equal to the pre-1970 levels. It is assumed that the numbers of children in regular division classes may return to such levels. The existence of both state and federally mandated programs, and the need to maintain special area teaching personnel in numbers sufficient to comply with planning time requirements of the teacher bargaining agreements will preclude a return of the total certificated staff-student ratio common to pre-1970 levels.

It has been further assumed that limited use will be made of noncertificated instructional aides in regular classrooms while the widespread use of aides in health and library services has been prevalent.

There may be some greater tendency to retain district employment of custodial personnel to service rented facilities. Often such persons are employed locally and, therefore, bolsters the support for the local economy. Despite the increase in required paperwork from all branches of education, it is assumed that a "hold the line" approach will regulate the employment of office personnel.

Analysis of Plant Utilization

In this section a review of the physical facilities comprising each of the districts has been presented. The information used in the development of this section has been taken from the official housing reports of the districts. In addition, the utilization of the total school plant has been discussed based upon instructing either twenty-five or thirty children in each teaching station.

Four types of information have been presented on Tables 20 and 21. The information has included the name of the school, year of construction, year and description of additions, and the total number of classrooms per building. The total number of teaching stations owned by District 25 was 366 while the total number owned by District 87 was 171.

A general point of recognition must be made pertaining to housing the junior high school programs. Many auxiliary teaching stations part of the junior high school program usually are not equipped to instruct a total number of students equal to a number taught in a general area classroom. In fact, in the area of industrial arts, specific regulations restrict the number of students that may be taught in a room of conventional classroom dimensions.

Tables 22 and 23 have been developed to demonstrate the percentages of utilization of the respective buildings within each of the districts. Utilization percentages have been calculated for the selected years used throughout this discussion. In addition, utilization percentages have been developed both on a basis of twenty-five students to a teaching station and also on the basis of thirty students to a teaching station. Logically, calculations have been based upon teaching stations available in a building during a given year rather than upon a total number of rooms per building or rooms owned by the districts.

TABLE 20

SUMMARY OF DISTRICT 25 FACILITIES

School	Date of Construction	Date and Description of Additions	Number of Classrooms
Berkley	1970	1971 - Added 4 classrooms	12
Dryer	1951	1968 - Added 6 classrooms	17
Dunton	1964	1966 - Added 6 classrooms	
		1971 - Added 6 classrooms	17
Dwyer	1961	. . .	10
Greenbrier	1964	1966 - Added 10 classrooms	16
Ivy Hill	1965	1968 - Added 12 classrooms	17
Kensington	1961	1968 - Added 4 classrooms	19
Miner	1957	1964 - Added 18 classrooms	33
North	1938	1949 - Added 4 classrooms	13
Olive	1962	1966 - Added 8 classrooms	
		1971 - Added 4 classrooms and a library	19
Park	1953	1954 - Added 10 classrooms	16
Patton	1962	1966 - Added 8 classrooms	13
Rand	1969	1971 - Added 2 pods and a gymnasium	35
Ridge	1954	1955 - Added 7 classrooms	
		1958 - Added 4 classrooms	15
South	1925	1946 - Added 4 classrooms	
		1949 - Added 4 classrooms	
		1956 - Part of an admin- istrative wing	
		1966 - Added 12 classrooms and a gymnasium	32
Thomas	1964	1966 - Added 22 classrooms	34
Westgate	1957	1959 - Added 6 classrooms	16
Wilson	1934	1938 - Added 2 classrooms	
		1956 - Added 4 classrooms	
		1959 - Added 8 classrooms	15
Windsor	1958	1960 - Added 12 classrooms	17
Total Class- rooms K-8			366

TABLE 21

SUMMARY OF DISTRICT 87 FACILITIES

School	Date of Construction	Date and Description of Additions	Number of Classrooms
Field	1954	1963 - Added 1 classroom	7
Franklin	1957	1970 - Added 1 classroom	8
Jefferson	1928	1945 - Added 2 classrooms	
		1950 - Added 4 classrooms	
		1954 - Added 4 classrooms	
		1965 - Added 4 classrooms	18
Longfellow	1919	1930 - Added 2 classrooms	10
MacArthur	1957	1961 - Added 11 classrooms	
		1970 - Added 3 classrooms	30
Northlake	1969	. . .	30
Riley	1960	. . .	18
Sunnyside	1960	. . .	19
Twain	1955	1957 - Added 6 classrooms	13
Whittier	1945	1950 - Added 9 classrooms	
		1953 - Added 5 classrooms	18
Total Class-rooms K-8			171

TABLE 22

UTILIZATION OF SCHOOL FACILITIES
ARLINGTON HEIGHTS DISTRICT 25

School	1965-66 Utilization Percent		1969-70 Utilization Percent		1974-75 Utilization Percent		1975-76 Utilization Percent		1976-77 Utilization Percent	
	Ratio 1:25	Ratio 1:30	Ratio 1:25	Ratio 1:30	Ratio 1:25	Ratio 1:30	Ratio 1:25	Ratio 1:30	Ratio 1:25	Ratio 1:30
	Berkley	122	101	127	106	120	100
Dryden	139	116	112	94	98	83	93	78	93	78
Dunton	96	80	108	90	79	66	76	63	73	61
Dwyer	100	83	120	100	. . .	. . .	. . .	. . .	. . .	. . .
Greenbrier	134	112	133	111	95	80	92	77	90	75
Ivy Hill	. . .	. . .	145	119	100	84	92	77	92	77
Kensington	171	142	128	106	73	61	64	53	63	52
Miner	119	99	119	99	91	76	85	70	73	61
North	137	114	132	110	94	83	92	77	. . .	. . .
Olive	84	77	101	84	86	73	82	68	102	85

TABLE 22--Continued

School	1965-66		1969-70		1974-75		1975-76		1976-77	
	Utilization		Utilization		Utilization		Utilization		Utilization	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio
	1:25	1:30	1:25	1:30	1:25	1:30	1:25	1:30	1:25	1:30
Park	152	127	131	110	94	78	89	74	83	80
Patton	184	153	135	113	85	71	75	62	67	56
Rand	. . .	. . .	67	56	85	71	86	72	84	70
Ridge	131	109	130	108	104	87	100	83	96	80
South	151	126	112	93	107	90	99	83	91	76
Thomas	232	194	107	89	92	77	86	71	78	65
Westgate	122	102	105	88	99	83	95	79	94	78
Wilson	128	107	133	111	85	71	71	59	66	55
Windsor	176	146	140	117	97	81	99	83	100	83
District Total	152	127	119	97	96	80	91	76	84	70

TABLE 23

UTILIZATION OF SCHOOL FACILITIES
BERKELEY DISTRICT 87

School	1965-66		1969-70		1974-75		1975-76		1976-77	
	Utilization		Utilization		Utilization		Utilization		Utilization	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio	Ratio
	1:25	1:30	1:25	1:30	1:25	1:30	1:25	1:30	1:25	1:30
Field	135	113	134	112	92	77	73	60	• • •	• • •
Franklin	106	89	84	70	71	60	73	61	• • •	• • •
Jefferson	94	79	117	98	78	65	73	61	73	61
Longfellow	100	84	99	83	86	72	80	67	76	63
MacArthur	70	67	81	68	54	45	47	39	52	43
Northlake	• • •	• • •	• • •	• • •	45	38	45	37	39	33
Riley	69	57	65	55	76	63	71	59	80	67
Sunnyside	86	72	84	71	86	72	86	72	89	74
Twain	133	111	137	114	84	70	76	63	71	59
Whittier	102	85	97	81	55	46	50	42	55	45
District Total	100	77	105	81	68	56	63	53	58	48

It should be noted as significant that District 25 closed the Dwyer School when the utilization of district facilities, including the deployment of the Dwyer students, was at ninety-five percent efficiency on a basis of thirty students to a room. It was determined, however, that programming for the students could better be accomplished in a larger and more physically complete plant on the same campus. It should be further noted that through 1965 to 1969 the total district facilities were used at ninety-nine percent efficiency based upon thirty children to each available teaching station. By 1974-75 the utilization efficiency of the various buildings had dropped to a range of 73 percent to 122 percent efficiency on the basis of twenty-five students to a room and a range of from 66 percent to 101 percent efficiency based upon thirty children to a room. In 1976-77 the utilization of district facilities had dropped to eighty-four percent and seventy percent based upon twenty-five or thirty children to a teaching station. These percentages included the reassignment of children from the North School which had been closed in the summer of 1976. Further projections of declining enrollment motivated the closing of the Wilson School in the summer of 1977 and the scheduled closing of Miner School in June 1978. District administrators have reported that based upon current projections only fifty percent of the district's facilities may be required to house students by the mid-to-late 1980's.

Analysis of Table 23 has strongly suggested that there was insufficient need to build a second junior high school building. This suggestion was based upon inspection of the relationship between the utilization of the district's facilities during the 1965 and 1969 school years. The utilization of both total district and specific schools in District 87 had dropped to a lower level prior to beginning of the closing process than was the case in District 25, but under the leadership of the new superintendent the closing process has proceeded at a more rapid rate. By June 1977, four buildings or approximately twenty-two percent of the available classrooms had been closed. Speculation has also been reported by district administrators that by the mid-1980's less than half of the districts' facilities may be required to house students.

Summary of plant utilization. Based upon information presented in this section it has been assumed that no specific guidelines may be developed to regulate the level of plant utilization efficiency at which a district should consider closing school buildings. It is proposed, however, that the maintenance of plant utilization information is a useful tool to aid the board of education, administrators, and other persons involved in long range planning to understand and interpret the degree to which district facilities are utilized efficiently.

It has been assumed that based upon information acquired in the case study, that board members and administrators agree with

the literature in regards to the major points of consideration in selection of a school building to be closed. In conclusion those considerations include:

1. Availability of adjacent school buildings to absorb the displaced students.
2. Age and physical condition of a school.
3. Least restrictive consequences ensuing to the community as a result of the closing of a school.
4. Financial savings associated with the closing of a building.

One board member described aptly the process of determining which school to close by first resolving which school must more imperatively remain open.

SUMMARY

The following comments have been presented in the interest of highlighting the major points of view extrapolated from the presentation and the analysis of the data. The major conclusions drawn from the study have been presented in Chapter V.

Regarding Analysis of the Observers' Ratings to the Problem Solving Model

The raw score responses of superintendents and business executives have indicated a marginal tendency for the two panels to reach three or more observer agreement on the same events from the "Reconstruction of Events" using a problem solving model.

Both panels showed agreement of events to the same step of the model on forty-eight percent of the events from both districts.

A remarkable level of agreement was noted in the tendency for superintendents to agree with superintendents on the classification of events to a step of the model and for a business executive to agree with business executives on the classification of events to steps of the problem solving model. The superintendents showed three or more observer agreement on the classification of over eighty-six percent of the events from both districts while the business executives showed seventy-six percent agreement.

Of the events classified as five of five observer agreement, it was suggested that superintendents tended to regard events indicative of "fate accomplished" as step 4, feasibility testing of selected alternatives, while business executives selected events indicative of "open for alternative action" as step 4. The responses of the two panels classified as four of four observer agreement further suggested that there was a difference between what superintendents and business executives regarded as feasibility testing of selected alternatives. These responses inferred that action of the board of education had a different connotation for the two panels. The responses of the panels to step 5, adaptation and diffusion, suggested a further difference in what type of events each group regarded as characteristic of step 5.

Some assumptions were drawn regarding the differences that existed between the manner in which the two panels classified

the same events as different steps of the problem solving model. Business executives seemed to classify events more purely from the content of the event as presented. Further, business executives seemed to express a higher incidence of no agreement on events involving communication to the public. The business executives also tended to place more agreement upon events involving consideration of the staff than did the superintendents. The tendency for business executives to classify more events as indication of a concern may be assumed related to the concept that superintendents should be responsible for promulgating the information reflecting the concern. Such type of information could then be considered logically as diagnosis of a situation by the superintendents. The lack of three observer agreement was concluded to be an inadequate criterion upon which to assume that no agreement events were also noncritical events.

It was further assumed that the superintendents appeared to have a different understanding of the nuances of working effectively with the board than did the business panel. The superintendents further reflected a broader understanding of the responsibilities of the board and its chief executive officer. Differences expressed by the two panels could have also related to semantic interpretation of the events or to semantic interpretation of the model. In addition, the background experiences of the members of a panel and of the educators and business executives may have also accounted for further differences.

The lack of agreement concerning the classification of specific events by both panels regarding events dealing with public opinion, public action, and presentation of information to the public has been assumed to be a point of caution that should be noted as others approach the resolution of problems associated with declining enrollment.

Those events classified by both panels of experts as the same step on the problem solving model were regarded as singularly characteristic of significant events associated with the problems of declining enrollment. An analysis of the events was proposed and implications were drawn from similar events. The implications were then contrasted and compared to information presented in the literature.

Implications drawn included the need for school districts to be aware of any trends in enrollment patterns, but also to project enrollment for five-to-ten years into the future. The advisability of obtaining an outside consultant was further discussed. The joint involvement of boards of education, administrators, teachers, and citizens was further stressed in both reviewing concerns generated by fiscal crisis and in developing alternative plans associated with fiscal limitations such as reduction in force, school closure, and determination of appropriate uses for closed buildings. Implications emphasizing the extent of board power as a governmental agent was also noted. Further, consideration was given to the legal implications of reduction in force as well as to the need for specific board policies to deal with

the issue. School closings may require different types of programming such as multi-age or cross-age program development. Finally, it was implied that a limited market existed for the purchase of old school buildings and a model leasing agreement was discussed.

Regarding Concerns of Persons Involved in the Closing of Schools

The concerns of members of the boards of education, parents, principals, and teachers as expressed in this study would tend to indicate some significant differences in comparison to the concerns for these groups as expressed by the literature.

The responses of the boards of education appeared to be more related to the decision making process of closing of buildings and the subsequent effects upon the community than were the somewhat more personally or politically oriented concerns expressed in the literature. This study has not attempted to determine the motivation behind the responses of people, so it may not be ruled out that the concerns of board members were without self-oriented political motivation. Personal judgment based upon collection of the data would support the sincerity of concerns as expressed in behalf of community welfare.

It has been concluded that the major concerns, the child oriented concerns of parents regarding the closing of schools, agreed closely with the literature. In contrast to the literature, however, were the minor concerns reported regarding the loss of status of parents in local school affairs.

Some degree of agreement was noted between the concerns expressed by principals and the literature regarding the loss of jobs, working relationships with teachers, and the local school community. It may be concluded that principals are far more concerned with factors that are of direct bearing upon the teachers than reported by the literature.

The concerns of teachers regarding the loss of jobs and adjustment to new schools were reported in agreement with the literature. A considerably wider range of concerns were expressed by the teachers than were reported by the literature. A major concern reported by teachers related to the issue of increased class size and split classes. This was the only concern that indicated a difference might have existed between the concerns of teachers in the two districts. There was a wide variety of concerns regarding the reduction in force expressed by the teachers. These concerns ranged from concerns regarding reduction on a seniority basis to maintenance of the best teachers regardless of seniority and tenure status. From indications made by the respondents it has been concluded that these concerns were not specific to either tenure or non-tenure teachers. Furthermore, it appeared that concerns regarding these issues were specific to the concerns of teachers from the case study districts and are in primary disagreement with the literature. The literature frequently has associated these concerns with boards of education, parents, and teachers but seldom, if ever, with organized teachers' groups.

The concerns regarding the adjustment of children to new schools, loss of special services, and adjustment of teachers to new schools were the only concerns that appeared to have some greater significance to teachers who had worked in a building that had been closed as compared to teachers in general.

Regarding Fiscal Conditions, Sources of Revenues, Enrollment Statistics, Staffing Statistics, and Plant Utilization

The data would suggest that local districts should tend to expect a decrease in the gross amount of local tax support as a source of revenue during the years of crucial financial concerns associated the reduction of enrollment. A similar decrease in the receipt of total revenue of between six-to-eight percent was noted at a time enrollment had declined in both districts by twenty-six to twenty-eight percent from the year of the peak enrollments. A near equivalent rate of increase of per student costs had been indicated for both districts during a twelve-year period despite the incidence of significant differences in the rates of assessed valuation and actual amounts of per student costs. The rate of increase over the twelve-year period from 1965-66 to 1976-77 ranged from 218 percent to 226 percent. The effects of massive reduction in force, from seventeen to twenty-three percent in total staff, has had a slight effect upon reversing the negative rate of increase for year-end-assets in the fiscal year following the reductions.

In addition, it may be assumed that the closing of schools did not have a direct relationship upon the increase of transportation costs when compared with the rate of increase for total expenditures. Such a factor would appear to be directly related to a specific district, although, an increase in expenditures in this area should be contemplated.

Finally, state aid based upon membership has been of significant assistance to districts having experienced critical rates of enrollment decline. The logic of basing aid upon membership has been associated with the fact that major school expenditures are contracted on an annual basis. The logic of using a multi-year membership factor has been associated with the difficulty of reducing staff until such a time as enrollment decline reaches a cumulative level of significance.

Even though districts have experienced expansive decrease in total district enrollment, the increase in enrollment of students in self-contained special education programs has continued to increase by significant proportions. The recommendations of the literature regarding development of specific projection information by age and specific attendance centers has been emphatically indicated by the analysis of the data.

The data has suggested that teacher aides are not generally used in the classroom but that aides are generally used in health and library services. Districts have preferred seemingly to retain employment of custodians to service school buildings that have been

leased. Districts appear to have attempted to maintain limits regarding increasing employment of office personnel.

It has appeared doubtful that certificated personnel-student ratios will return to the pre-1970's level although the increase in enrollment in regular division classrooms may return to such levels. The mandated special education and other minority legislation, including specific teacher-student ratio regulations, will be the primary factors contributing to these increases. Furthermore, the development of multi-age classrooms will be a reality of declining enrollment.

Reduction in force sequences have included reduction of administrators at the building level, support service special education personnel, nursing and library personnel, special teaching area personnel, and finally, classroom teachers in significant numbers. It will be highly questionable that districts will continue to reduce special education personnel as early in the reduction in force sequence especially resultant of the implications of federal legislation mandating services to non-public schools effective September 1978.

Mild school closings, the closing of one or more buildings of ten or fewer rooms, has occurred when enrollment decline reached sixteen to twenty-two percent decline. Moderate school closing, the closing of one or more buildings of fifteen or more rooms, occurred when decline had reached twenty-six to twenty-eight percent decrease of the student population as compared to peak year enrollments.

A review of the data has suggested that some districts may be faced with the dual problems of experiencing significant declining enrollment and also of having overbuilt their physical plants.

The data would further suggest that no general guidelines may be developed to regulate the level of plant utilization that a district should experience prior to closing buildings. The data strongly suggested that the maintenance of plant utilization statistics would be an excellent system of maintaining and describing this vital area of planning. Finally, it has been further assumed that board members strongly agree with the literature regarding the major points of consideration in determining which of a district's buildings should be closed.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

General Summary

The general purpose of this dissertation was to analyze the manner in which selected school districts planned for and coped with the problems ensuing from declining enrollment. The study was intended to provide a reconstruction of the significant events that occurred within each district beginning with the initial recognition of the problem through the designation of use of a closed school building. Further, the purpose was to determine the similarities and differences that occurred within each district. Two panels of expert observers, one panel from the field of education and the other from outside the area of education, analyzed the specific events in relationship to a given problem solving model. As an analysis of the occurrences in each district was applied, further analysis was made regarding the interpretations of events made by administrative executives from the two disciplines.

A survey of the literature was presented to provide the practicing administrator or school board member with a source for review of some of the major contributions pertaining to the problems associated with declining enrollment. The review of literature was implemented relating to the five major problems usually associated with the topic. The area of projection of school enrollment

was reviewed. The methodologies used to project enrollment patterns and the factors usually affecting enrollment projection were well represented in the literature. The historical data pertaining to initial awareness of the problem as well as the status of national and State of Illinois projections for the future were well documented. A second area of the literature related to the impact of the economics of declining enrollment. Studies were available suitable to a broad study of this problem. Information regarding projected and real savings associated with school closure, the costs of operating schools of minimum size, and the economic effect upon the community at large were among the topics addressed. The literature tended to underestimate the savings associated with school closure as compared to this research. A third area reviewed facility closings. The literature provided numerous guidelines and timetables to facilitate the process. The psychological and emotional issues relating to the community and to a lesser extent to the staff have also been addressed by the literature. Limited information was available pertaining to the curricular consideration associated with elementary school closings. Another problem considered was that specific to staffing issues. Legal implications, suggestions for board policy, and considerations to make in order to keep the best tenured staff were discussed. Few articles appeared regarding the specific nature of required redirection of management during periods of enrollment decline. The literature cautioned districts regarding permanent disposal of too many surplus schools.

A wide variety of options for use of surplus space have been discussed. The literature presented little practical information regarding sources of revenue suitable to implement the utilization of surplus space other than for revenue drawn from the private sector. In addition, the literature has not addressed the issue of effectively using the vast number of school buildings that may become vacated during the next decade.

The case study included extensive interviews with chief school administrators as well as conversations with board members and parents. Concerns were also solicited from principals and teachers. In addition, extensive review of legal records of the district including board manuals, negotiated contracts, board minutes, budgets, audit reports, and relevant State and County reports was accomplished. Generally, information was reviewed for the years between 1965 and 1977. The research evidence was formulated to develop a chronology of significant events for each district.

The events were submitted for ranking by two panels of expert observers according to a problem solving model. The panel of business executives showed remarkable agreement with business executives in ranking the same events to respective steps of the model while the panel of superintendents demonstrated slightly greater agreement with superintendents in ranking of these events. The business executives showed little to moderate agreement with the school superintendents in classifying the same events to the same steps of the problem solving model. Few events were regarded as identification of a concern or adaptation and diffusion by either panel.

Disagreement existed between what superintendents regarded as diagnosis of a situation or adaptation and diffusion and what business executives regarded as identification of a concern. Further disagreement was noted as to the content of events classified as feasibility testing of selected alternatives by each panel. Assumptions were drawn regarding the differences between the panels based upon their classification of events and the specific content of the events.

Implications were extrapolated from the sequences of events that both panels demonstrated agreement upon in terms of classification to the same step of the model. Events showing such agreement were regarded as the more significant events from the respective chronologies. The implications cited were discussed in relationship to the five areas reviewed in the literature.

Further comparison and analysis were made regarding the concerns of the major groups of people involved in school closure. The concerns of the groups were compared between districts, between persons having been directly associated with a building that had been closed, and between the concerns for the respective groups as expressed by the literature.

Finally, comparisons and analysis were made regarding fiscal conditions, sources of revenues, enrollment statistics, staffing statistics, and plant utilizations. Comparisons over a twelve-year period were made between the districts and assumptions were proposed.

Conclusions

The following conclusions have been drawn from an analysis of the literature, as analysis of the reconstructed events and from implications drawn from specific case study datum.

Conclusions Regarding Enrollment Projection

1. Perhaps with the exception of recent years, school districts have performed little if any enrollment projections prior to experiencing their peak enrollments.

2. Formal or informal enrollment projection studies have been completed by school districts prior to formulation of alternatives regarding the management of enrollment decline.

3. School districts experiencing declining enrollment are aware of the possibility of some increased enrollment in the future and have considered such possibilities in their planning.

4. Special education enrollments will continue to increase at an extraordinary, nonproportionate rate to the decline of the total population.

Conclusions Regarding the Economics of Declining Enrollment

1. Those factors most contributory to fiscal crisis within a school district include decreased assessed valuation, loss of state aid, spiraling inflation, and increased teacher power.

2. Determination of a need for schools to operate efficiently as opposed to operating within the limits that a community is willing

to support should be a major philosophical question of the boards of education.

3. Determination that school closure was the most appropriate alternative to meeting fiscal crisis has been a major concern for the boards of education.

4. Operation of school buildings with less than 200 student population is fiscally unsound.

5. Contrary to the indications of the literature, a school closure should generally result in an annual savings of between 50,000 dollars and 80,000 dollars depending upon the size and condition of a building.

6. Closure of schools has a significant long time effect upon cumulative budget reduction extending over a number of years.

7. Reduction in force has been the major single factor in generating significant budget reductions.

8. Significant reduction in force and school closures have a mild effect upon decreasing per pupil costs from previous years but does have a noted effect upon decreasing the rate of inflation of per pupil costs compared to previous years.

9. Districts may expect a decrease in the rate of local tax support as compared with previous years.

Conclusions Regarding Facility Closings

1. Alternatives to conventional grade-age organizational grouping of students are essential to coping with declining enrollment.

2. Major instructional advantages of consolidation include

greater flexibility in arranging instructional groups, more expansive availability of libraries and media facilities, and availability of special facilities for the fine and practical arts.

3. The major disadvantages associated with consolidation include loss of the neighborhood school concept, increase of transportation, and increase of relocation and readjustment of students.

4. Overbuilding of facilities significantly increases the problems associated with declining enrollment.

5. Public hearings allow the opportunity for individuals or group representatives to vent emotions regarding issues prior to formal board meetings. The effect of such expression allows better opportunity for boards to make decisions based upon logic rather than under the possible influence of emotion.

6. A community task force should be formally organized as an advisory group to consider the problems associated with declining enrollment. A committee of the whole of a board of education may serve as an effective task group if board members are able to make the expansive time commitment necessary to implement study and analysis as associated with the public hearing process.

7. Essential community involvement includes awareness of: significance of financial crisis, significance of enrollment decline, and significance of possible alternatives. Community members must have ample opportunity to express concerns. Rumors fill any void left open by a lack of information.

8. Factors considered by a district regarding identification

of a building to close includes: proximity of receiving schools to accommodate the dislocated students, age and condition of the building to be closed, consequences least restrictive for the community at large, and the financial savings associated with the closure.

9. Closure of one or more buildings of ten rooms or less has occurred when enrollment had declined by 16 percent to 22 percent, while buildings of fifteen rooms or less were closed when decline was between 26 percent and 28 percent of peak enrollment.

Conclusions Regarding Staffing Issues

1. Any reduction in force must be accomplished within the specific legal framework of the respective school district. Teachers' rights to vacant positions may be an issue addressed by the Courts of the State of Illinois within the near future.

2. Concern for staff morale and other staff related issues are reported by principals as more significant than loss of jobs or other areas reported by the literature as significant to principals.

3. In addition to the reports of the literature, increase in class size and split classes were major concerns of teachers.

4. Limited use of instructional aides has been made in regular classrooms while widespread use of aides has been made in health and library programs.

5. The concerns of board members, principals, and teachers are more diverse and comprehensive than were the concerns reported by the literature.

6. It is unlikely that the student-certificated personnel ratio will return to the 1-25/30 ratio common prior to 1970; however, the student-classroom teacher ratio will probably supersede the 1-30/35 ratio reported prior to the 1970's.

Conclusions Regarding Surplus Space

1. Community opinion regarding acceptable uses of closed facilities is essential.

2. School districts concur with the literature regarding the detrimental effect upon the community of boarding up school buildings.

3. General coverage of the media and "word of mouth" have been the most frequent ways through which renters have learned of availability of closed schools.

Conclusions Regarding the Use of the Problem Solving Model

1. An interpretation of less than three observer agreement was not a suitable method of designating noncritical events.

2. Business executives and school superintendents demonstrate remarkable agreement with their respective colleagues to classify events to specific steps of a problem solving model. A considerable lack of agreement exists between the two disciplines regarding the classification of the same events to the same steps of a decision-making model.

3. Specialized knowledge within a discipline has been the

most common factor associated with the tendency for disagreement between executives from the two disciplines to evaluate events.

Recommendations

1. The Illinois Office of Education should provide the necessary computer assistance to accomplish enrollment projections based upon a model provided by the State with data input provided by the local districts.
2. When possible districts should secure the services of outside consultants to develop or review enrollment projections and develop plant utilization analysis.
3. When a definite trend for declining enrollment has been noted, chief school administrators and boards of education are obligated to plan steps for definitive action.
4. In diagnosing fiscal concerns for schools with low enrollments, school districts should calculate the costs of keeping schools open on a per child basis excluding teacher salaries.
5. States should regularly reevaluate their methods of providing state support to the school districts in relationship to the specific incidence and rate of enrollment decline; however, state aid for districts experiencing significant decline should be based upon student membership rather than upon attendance factors.
6. The legislature should evaluate granting wider latitude to local boards of education, within discrete limits, to levy "cost of living" revenue increases from local revenues and to petition increases from state revenues.

7. The interest of community groups in using parts of school buildings should be a routine component of diagnosis of declining enrollment alternatives.

8. Efforts to determine alternative suitable uses of supernumerary facilities should begin early in the diagnosis of factors that may lead to school closure.

9. Administrators and board members should not overlook the possible attempts of community special interest groups to involve municipal governments in the school closing issue as related to zoning and use ordinances factors.

10. Efficiency of plant utilization data should be an essential component for developing long-range plans as well as for effective dissemination of information.

11. Districts may wish to solicit community opinion formally regarding the closing of a school by associating the costs of maintaining a building with a necessary rate referendum proposal.

12. Boards of education should establish board policy including areas such as assignment and transfer of personnel, regulation of class size, teacher evaluation, and procedures for reduction in force.

13. State legislatures should evaluate the moral justification and constitutionality of educational mandates requiring significantly different service delivery for minority student populations than for regular division student populations.

14. School districts should strongly consider a moratorium

upon any building of additional schools without completely exhausting the availability of leasing or purchasing public or parochial elementary or high school buildings within the adjacent communities.

15. Even though school districts may employ a broker after one attempt has failed to sell a building at public auction, further legislative change should be considered to allow districts to employ a broker upon initial decision of the board of education to sell an unused school building.

Areas for Further Study

This study was not developed as a study from which specific statistical inferences should be drawn. Rather the value of this study may be with the questions that it has raised. In line with this thought the following suggestions are offered for further study:

1. A comprehensive study would be valuable regarding the general issues and procedures associated with the closing of schools throughout the State of Illinois.

2. A sophisticated investigation should be made of the constitutionality of state and federal mandates requiring provision of a different delivery of services to minority student populations than to regular division students.

3. The closing and vacating process of elementary schools has been reported to be relatively uninvolved. A further study of this process should be conducted as related to junior and senior high schools and the dissolution of their large libraries, laboratories, practical arts facilities, and fine arts facilities.

4. More study and research should be initiated regarding the alternative uses for urban, suburban, and rural schools.

5. A further area of research should address the issues of the utilization of schools as well as the gross effect upon the State of Illinois economy associated with the closure of the vast number of buildings projected to be closed within the next decade.

Concluding Statement

One of the purposes of this study was to provide school administrators and board members with a concise review of the events and decision making process that had occurred in two districts having experienced serious enrollment decline. This dissertation has not intended to provide specific answers to the many problems of declining enrollment, but it has been prepared with the intention of providing a source from which inference and supposition may be drawn. Hopefully this study will serve as a reference point from which further analysis may be made.

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APPENDIX A

TABLE 1

SUMMARY OF SCHOOL SUPERINTENDENTS ANALYSIS
OF THE CHRONOLOGY OF EVENTS OF DECLINING ENROLLMENT
OCCURRING IN DISTRICT 25

Event No.	Observers Raw Scores					Number of Observers in Agreement	Problem Solving Model Step No.
	Supt. 1	Supt. 2	Supt. 3	Supt. 4	Supt. 5		
1	1	1	1	1	2	4	1
2	3	3	3	2	2	3	3
3	4	4	4	4	3	4	4
4	3	4	4	4	4	4	4
5	1	2	2	1	2	3	2
6	2	2	2	1	2	4	2
7	3	3	4	4	3	3	3
8	2	2	2	1	2	4	2
9	3	3	2	3	2	3	3
10	4	4	4	5	4	4	4
11	3	4	3	3	4	3	3
12	4	3	4	4	3	3	4
13	4	4	4	4	3	4	4
14	2	3	3	2	2	3	2
15	3	4	4	3	2	0	0
16	5	4	4	4	3	4	3
17	2	2	2	2	2	5	2
18	5	3	3	3	3	4	3
19	5	3	5	3	2	0	0
20	2	3	5	3	3	3	3
21	2	3	2	3	4	0	0
22	3	3	3	3	2	4	3
23	4	3	4	3	3	3	3
24	5	4	4	4	3	3	4
25	5	4	4	5	3	0	0
26	5	3	3	5	3	3	3
27	5	3	3	5	3	3	3
28	3	4	5	4	4	3	4
29	4	3	4	5	4	3	4
30	5	4	4	4	4	4	4
31	4	4	4	4	4	5	4
32	5	4	4	4	3	3	4
33	3	5	3	3	4	3	3
34	4	5	5	5	3	3	5
35	4	3	2	3	2	0	0

TABLE 1--Continued

Event No.	Observers Raw Scores					Number of Observers in Agreement	Problem Solving Model Step No.
	Supt. 1	Supt. 2	Supt. 3	Supt. 4	Supt. 5		
36	5	5	5	3	5	4	5
37	5	5	5	3	5	4	5
38	2	2	1	1	2	3	2
39	3	2	3	2	3	0	0
40	4	3	3	3	3	4	3
41	5	3	3	3	4	3	3
42	3	3	3	3	4	4	3
43	4	4	4	4	3	4	4
44	5	4	4	4	3	3	4
45	4	3	3	5	2	0	0
46	5	4	4	5	3	0	0
47	3	2	4	5	4	0	0
48	2	2	4	5	2	3	2
49	5	4	4	4	4	4	4
50	5	4	4	4	3	3	4
51	4	4	3	4	4	4	4
52	2	4	4	4	2	3	4
53	4	4	4	4	3	4	4
54	4	4	4	4	3	4	4
55	5	4	4	4	3	3	4
56	3	3	3	3	4	3	4
57	3	4	4	5	3	0	0
58	5	3	4	5	4	0	0
59	5	3	3	3	4	3	3
60	5	4	4	4	3	3	4

TABLE 2

SUMMARY OF BUSINESS EXPERTS ANALYSIS
OF THE CHRONOLOGY OF EVENTS OF DECLINING ENROLLMENT
OCCURRING IN DISTRICT 25

Event No.	Observers Raw Scores					Number of Observers in Agreement	Problem Solving Model Step No.
	Bus. Expert 1	Bus. Expert 2	Bus. Expert 3	Bus. Expert 4	Bus. Expert 5		
1	1	1	1	1	1	5	1
2	3	3	2	3	3	4	3
3	4	5	3	3	4	0	0
4	4	5	3	4	4	3	4
5	1	1	1	2	1	4	4
6	2	3	1	4	1	0	0
7	4	4	3	5	4	3	4
8	2	4	2	4	1	0	0
9	3	3	1	1	1	3	1
10	4	4	3	3	4	3	4
11	1	3	3	5	3	3	3
12	4	5	3	5	4	0	0
13	4	5	4	3	4	3	4
14	2	2	2	1	1	3	2
15	2	3	2	2	1	3	2
16	4	4	4	3	4	4	4
17	2	3	3	3	3	4	3
18	1	5	2	2	1	0	0
19	1	5	2	3	1	0	0
20	1	3	2	4	3	0	0
21	1	4	3	3	2	0	0
22	1	2	3	5	1	0	0
23	3	4	3	5	3	3	3
24	4	5	4	3	4	3	4
25	4	5	4	4	4	4	4
26	4	3	4	5	4	3	4
27	4	5	3	3	4	0	0
28	4	4	3	2	4	3	4
29	4	5	3	5	4	0	0
30	4	5	3	3	4	0	0
31	4	5	4	4	4	4	4
32	4	5	4	4	4	4	4

TABLE 2--Continued

Event No.	Observers Raw Scores					Number of Observers in Agreement	Problem Solving Model Step No.
	Bus. Expert 1	Bus. Expert 2	Bus. Expert 3	Bus. Expert 4	Bus. Expert 5		
33	4	4	4	4	4	5	4
34	4	4	4	3	5	3	4
35	4	2	2	3	4	0	0
36	5	4	2	5	5	3	5
37	5	4	2	5	5	3	5
38	1	1	3	4	1	3	1
39	1	3	3	4	3	3	3
40	3	3	3	3	3	5	3
41	3	3	3	5	3	4	3
42	4	4	3	3	3	3	3
43	4	5	4	3	4	3	4
44	4	5	4	4	4	4	4
45	4	3	4	4	4	4	4
46	4	5	4	3	4	3	4
47	4	1	4	4	5	3	4
48	4	1	4	5	4	3	4
49	4	5	4	4	4	4	4
50	4	5	4	4	4	4	4
51	4	4	4	3	4	4	4
52	4	1	4	4	4	4	4
53	4	5	4	4	4	4	4
54	4	5	4	3	4	3	4
55	4	5	4	4	4	4	4
56	4	4	4	3	4	4	4
57	4	4	4	3	4	4	4
58	4	1	4	2	4	3	4
59	4	4	4	3	4	4	4
60	4	5	4	4	4	4	4

TABLE 3

SUMMARY OF SCHOOL SUPERINTENDENTS ANALYSIS
OF THE CHRONOLOGY OF EVENTS OF DECLINING ENROLLMENT
OCCURRING IN DISTRICT 87

Event No.	Observers Raw Scores					Number of Observers in Agreement	Problem Solving Model Step No.
	Supt. 1	Supt. 2	Supt. 3	Supt. 4	Supt. 5		
1	2	2	1	3	2	3	2
2	3	3	4	4	4	3	4
3	1	2	2	1	2	3	2
4	2	1	5	1	1	3	1
5	4	3	4	4	3	3	4
6	3	4	4	4	3	3	4
7	3	3	2	3	2	3	3
8	3	2	2	3	2	3	2
9	3	4	4	4	3	3	4
10	1	4	4	4	3	3	4
11	3	3	2	4	2	0	0
12	4	3	3	4	3	3	3
13	3	2	3	4	2	0	0
14	5	3	3	5	5	3	5
15	3	5	5	5	3	3	4
16	2	2	1	1	2	3	2
17	1	2	1	2	2	3	2
18	5	3	5	5	5	4	5
19	4	3	3	3	3	4	3
20	5	3	3	5	3	3	3
21	5	4	4	4	4	4	4
22	3	4	4	4	4	4	4
23	4	4	4	4	3	4	4
24	5	3	5	5	5	4	5
25	3	4	4	4	3	4	3
26	5	3	4	5	5	3	5
27	1	4	4	4	4	4	4
28	3	3	2	5	5	0	0
29	3	3	3	3	3	5	3
30	4	3	3	3	3	4	3
31	2	3	3	5	5	0	0
32	4	3	3	5	3	3	3

TABLE 3--Continued

Event No.	Observers Raw Scores					Number of Observers in Agreement	Problem Solving Model Step No.
	Supt. 1	Supt. 2	Supt. 3	Supt. 4	Supt. 5		
33	5	4	4	4	3	3	4
34	5	4	4	4	3	3	4
35	3	3	3	4	3	4	3
36	3	3	3	2	4	3	3
37	3	4	4	4	4	4	4
38	5	4	4	4	4	4	4
39	5	4	4	4	4	4	4
40	4	4	4	4	3	4	4
41	5	4	4	4	4	4	4
42	1	4	4	4	4	4	4
43	2	3	4	4	4	3	4
44	2	3	3	5	3	3	3
45	3	4	4	4	3	3	4
46	5	4	4	4	4	4	4
47	3	4	4	4	3	3	4
48	4	3	4	4	4	4	4
49	5	3	5	5	5	4	5
50	4	3	3	5	4	0	0
51	4	4	4	4	3	4	4
52	2	4	4	5	4	3	4
53	4	4	4	4	3	4	4
54	4	4	4	5	3	3	4
55	4	4	4	4	4	5	4
56	4	4	4	4	4	5	4
57	2	3	3	2	4	0	0
58	4	4	4	4	4	5	4
59	5	3	5	5	5	4	5
60	4	4	4	4	3	4	4
61	2	3	2	2	2	4	2
62	5	4	4	4	3	4	3
63	2	3	2	4	2	3	2
64	4	4	4	4	3	4	4

TABLE 4

SUMMARY OF BUSINESS EXPERTS ANALYSIS
OF THE CHRONOLOGY OF EVENTS OF DECLINING ENROLLMENT
OCCURRING IN DISTRICT 87

Event No.	Observers Raw Scores					Number of Observers in Agreement	Problem Solving Model Step No.
	Bus. Expert 1	Bus. Expert 2	Bus. Expert 3	Bus. Expert 4	Bus. Expert 5		
1	1	1	1	1	1	5	1
2	4	5	3	2	4	0	0
3	1	1	1	4	1	4	1
4	1	1	2	5	1	3	1
5	4	5	4	2	4	3	4
6	4	5	4	2	4	3	4
7	1	1	1	1	1	5	1
8	2	2	1	4	1	0	0
9	4	4	3	1	1	0	0
10	4	4	3	1	1	0	0
11	4	4	3	3	1	0	0
12	4	4	3	3	4	3	4
13	1	3	2	5	1	0	0
14	1	4	2	5	1	0	0
15	4	4	3	2	4	3	4
16	1	1	2	4	1	3	1
17	1	2	2	1	1	3	1
18	2	2	2	1	2	4	2
19	3	4	3	3	3	4	3
20	3	4	3	4	3	3	3
21	4	5	4	3	4	3	4
22	4	5	4	3	4	3	4
23	4	5	4	3	4	3	4
24	4	4	2	2	1	0	0
25	4	4	2	3	2	0	0
26	4	4	2	4	2	3	4
27	4	1	3	4	2	0	0
28	3	2	2	2	1	3	2
29	3	3	2	3	3	4	3
30	3	3	3	4	3	4	3
31	3	4	3	1	3	3	3
32	3	4	3	1	3	3	3

TABLE 4--Continued

Event No.	Observers Raw Scores					Number of Observers in Agreement	Problem Solving Model Step No.
	Bus. Expert 1	Bus. Expert 2	Bus. Expert 3	Bus. Expert 4	Bus. Expert 5		
33	4	5	4	3	4	3	4
34	4	5	4	4	4	4	4
35	4	4	4	5	4	4	4
36	4	4	3	4	3	3	4
37	4	5	4	3	4	3	4
38	4	5	4	2	4	3	4
39	4	5	4	5	4	3	4
40	4	5	4	2	4	3	4
41	4	5	4	3	4	3	4
42	4	4	4	3	1	3	4
43	4	1	4	4	4	4	4
44	4	4	4	5	2	3	4
45	4	4	4	3	2	3	4
46	4	1	4	2	2	0	0
47	4	4	4	.	3	3	4
48	4	4	4	4	3	4	4
49	4	5	4	1	1	0	0
50	4	4	3	2	3	0	0
51	4	5	3	3	4	0	0
52	4	4	4	3	2	3	4
53	4	5	4	4	4	4	4
54	4	5	4	3	4	3	4
55	4	5	4	4	4	4	4
56	4	5	4	3	4	3	4
57	4	3	3	4	2	0	0
58	3	5	4	2	4	0	0
59	4	4	4	5	1	3	4
60	4	5	4	3	4	3	4
61	4	2	3	4	2	0	0
62	4	5	4	5	4	3	4
63	4	4	4	5	3	3	4
64	4	4	4	4	4	5	4

TABLE 5

SUMMARY OF THE ANALYSIS OF THE RESPONSES BY THE PANELS
INDICATING AGREEMENT OF 5 OF 5 MEMBERS TO THE
CHRONOLOGY OF EVENTS IN DISTRICT 25 AND DISTRICT 87

Problem Model Step	School Superintendents		Business Executives	
	Event Number	Total Events	Event Number	Total Events
Analysis of District 25 Events				
Step Number 1	N/A	0	1	1
Step Number 2	17	1	N/A	0
Step Number 3	N/A	0	40	1
Step Number 4	31	1	33	1
Step Number 5	N/A	0	N/A	0
		2		3
Analysis of District 87 Events				
Step Number 1	N/A	0	1, 7	2
Step Number 2	N/A	0	N/A	0
Step Number 3	29	1	N/A	0
Step Number 4	55, 56, 58	3	64	1
Step Number 5	N/A	0	N/A	0
		4		3

TABLE 6

SUMMARY OF THE ANALYSIS OF THE RESPONSES BY THE PANELS
INDICATING AGREEMENT OF 4 OF 5 MEMBERS TO THE
CHRONOLOGY OF EVENTS IN DISTRICT 25 AND DISTRICT 87

Problem Model Step	School Superintendents		Business Executives	
	Event Number	Total Events	Event Number	Total Events
Analysis of District 25 Events				
Step Number 1	1	1	N/A	0
Step Number 2	5 6 8	3	N/A	0
Step Number 3	16 18 22 40 42	5	2 17 39 30	4
Step Number 4	3 4 10 13 30 43 49 51 53 54		5 16 25 31 32 44 45 49 50 51 52 53 55 56 57 59	
Step Number 5	36 37	10 2	60 N/A	17 0
		21		21
Analysis of District 87 Events				
Step Number 1	N/A	0	3	1
Step Number 2	61	1	18	1
Step Number 3	19 25 30 35 62	5	19 29 30	3
Step Number 4	21 22 23 27 37 38 39 40 41 42 46 48 51 53 60 64	16	34 35 43 47 48 53 55	7
Step Number 5	18 24 49 59	4	N/A	0
		26		12

TABLE 7

SUMMARY OF THE ANALYSIS OF THE RESPONSES BY THE PANELS
INDICATING AGREEMENT OF 3 OF 5 MEMBERS TO THE
CHRONOLOGY OF EVENTS IN DISTRICT 25 AND DISTRICT 87

Problem Model Step	School Superintendents		Business Executives	
	Event Number	Total Events	Event Number	Total Events
Analysis of District 25 Events				
Step Number 1	N/A	0	9 38	2
Step Number 2	14 38 48	3	14 15	2
Step Number 3	2 7 9 11 20 23 26 27 33 41 59	11	11 23 39 42	4
Step Number 4	12 24 28 29 32 44 50 52 55 56 60	11	4 7 10 13 24 26 28 34 43 46 47 48 54	14
Step Number 5	34	1	58 36 37	2
		25		24
Analysis of District 87 Events				
Step Number 1	4	1	4 16 17	3
Step Number 2	1 3 8 16 17 63	6	28	1
Step Number 3	7 12 20 32 36 44	6	20 31 32	3
Step Number 4	2 5 6 9 10 15 33 34 43 45 47 52 54	13	5 6 12 15 21 22 23 26 33 36 37 39 40 41 42 44 45 52 54 56	25
Step Number 5	14 26	2	59 60 62 63 N/A	0
		28		32

APPENDIX B

STATE OF ILLINOIS)
) SS:
COUNTY OF COOK)

IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT - LAW DIVISION

BILEK, Et Al.,)
)
 Plaintiffs,)
)
 v.)
)
BOARD OF EDUCATION, BERKELEY)
SCHOOL DISTRICT NO. 87,)
)
 Defendant.)
)

REPORT OF PROCEEDINGS had at the hearing of the
above-entitled cause, before the Honorable RICHARD L. CURRY,
Judge of said court, on the 10th day of August, A.D., 1977.

PRESENT:

MR. LAWRENCE WEINER
 appeared on behalf of the plaintiffs;

MESSRS. ROBBINS, SCHWARTZ, NICHOLAS & LIFTON, by
MR. LORENCE SLUTZKY,
 appeared on behalf of the defendant.

. . . THE COURT: Thank you, gentlemen.

The record should reflect that I have had the opportunity to review the pleadings and the briefs and the authorities in the case which the counsel here have now supplied the Court. I've also had the advantage now of their arguments in support of their respective positions.

As a point of first comment, it seems appropriate that the Court must state that the action of the Board, by law, must be presumed to be in good faith and to be of pure motives, absent a clear showing to the contrary. That is the law. And, of course, there is no charge here, I don't believe, although it seems to have crept out during the oral arguments, that there is a motive other than the proper and effective and efficient and economical operation of the School Board behind the Board's decision in this case to reduce the number of teachers in this district from 160 to 120. That being the case, it becomes, quite frankly, merely a case of statutory construction.

Statutory construction requires the Court to give meaning to the plain and ordinary meaning of the language that is used by the General Assembly. The courts are advised by the upper courts not to add words or to engraft meanings upon words that are used by the General Assembly so as to force an interpretation that is not covered by the words used in the statute.

The statute involved here is Chapter 24, Section 12, and it is one paragraph. In reading that paragraph, it was my

first and initial predisposition to interpret it in such a fashion as to protect the tenured teachers' status, because I do recognize that that is a status which has support, not only in the statute and throughout the statutes, but in all the case law which attempt to interpret the statutes as they relate to the teachers, protect the teachers, and make certain that they are not a pawn in a political setting and that the Boards of Education deal with them in a fair and open manner.

With that predisposition to read this statute, I found myself in a very difficult posture. The language reads, "If a teacher is removed as a result of a decision of the Board, one, to decrease the number of teachers employed by the Board or, two, to discontinue some particular type of teaching service. . . ." That is the beginning language of this sequence of events that the statute seeks to address itself to, first, a decision by the Board to decrease the number of teachers employed, or to discontinue some particular type of teaching service. In this instance, the Board made a determination to decrease the number of teachers employed by possibly 40, from 160 to nearly 120. The statute goes on and later provides for relief from this situation to teachers who are dealt with in this fashion, and it says, "If the Board, within one calendar year thereafter, increases the number of teachers or reinstates the positions so discontinued, these tenured teachers are to be the pool from which those positions are filled." The language there is silent as to attrition. It is silent there as

to vacancies in any fashion. The second portion of that paragraph, in my opinion, is inextricably tied to the first portion of the paragraph, which talks about two types of situations that the Board may be or will be confronted with, and that is to decrease the number of teachers or to discontinue a particular type of teaching service. Vacancies, attrition, death, marriage, moving out of the district, none of those things is encompassed within the frame of reference of the language used by the General Assembly in Chapter 24, Section 12. A zeal or a desire to interpret that kind of language into the language used by the General Assembly, in my opinion, is not well taken, because it appears to me from the Section as it relates to special education teachers that the General Assembly does know how to address itself to the particular problem of vacant positions when the General Assembly has vacant positions in mind. There, the General Assembly specifically provided for a manner in which people would be eligible, or special education teachers would be eligible on a continuing basis, even for vacant positions. That is an eventuality that is not provided for in Chapter 24. It seems to me that it would be engrafting language and interpretation upon language which is not to be found in the statute. It would have this court impose an entire new level of right to a teacher, which the General Assembly, for one reason or the other, saw fit not to give. For that reason, I am unwilling to interpret in that fashion. It may be that the Board or the various boards of education have an obligation to

deal with their teachers in such a fashion as to alleviate the problem. In this case, it may be that the Board even has a moral obligation. Be that as it may, if the rights of the teachers are prescribed within 24-12, and they are in this case, those rights as given to them in 24-12 do not stretch to the vacancies or the attrition problem that has been brought to our attention in this case. There is no legal obligation for the Board or the District in this case to provide reinstatement to those attrition vacancies or to those other vacancies from this pool, and for that reason, Counsel's motion to quash and dismiss the petition will be granted.

APPENDIX C

POSSIBLE TERMS AND CONDITIONS OF LEASE

Possible terms and conditions of a leasing agreement have been discussed with agents of the lesee. It appears that, while specifics would need to be developed more fully for contractual purposes, general agreement has been reached on a number of areas of consideration by the Board of Education.

1. Lease agreements, especially in the early years of any relationship, would be for one year at a time, with perhaps six month renewal options and notices. This provides for regular review by the district of the arrangement, and protects the lesee as it enters a new project.
2. All utility costs (heat, water, power, etc.) would be paid by the lesee. Billing would be through the district on a regular schedule. In the event any district use of a part of a facility was continued (for example, maintenance shops at . . .) the district would pay its actual share of such costs.
3. Custodial costs would be paid by the lesee. Personnel utilized for such services would be employed by the district and assigned to the approved facility. All salary costs and related fringe benefit costs would be repaid to the district through regular billing.
4. Sub-leasing to other parties would be prohibited except where specifically agreed upon mutually in advance.

5. The district will provide maintained building and grounds. Mowing, snow-removal and necessary basic maintenance will be provided. Up to ten rooms of tables and chairs and teacher seating and desks, as well as office desks and seating will also be provided. Minor alteration projects necessary for operation will be agreed upon, but limited to the degree that they can be reasonably handled by existing district staff and do not entail any significant out-of-pocket costs to the district not in any way significantly modify the building so as to affect its potential for possible use again in the future as a district facility. Rental rates for such facilities and services at either of the facilities under consideration are proposed not to exceed \$59,000 for the first year, \$64,000 for the second, and \$74,000 for the third year.
6. The lessee will provide such insurance as may be required to provide for specific liabilities inherent in its operation. The district will continue to insure the building and its contents, and will maintain such other insurance as it deems necessary to protect it from liability as a public agency.
7. In the event that additional parking is required for the accommodation of its regularly scheduled classes and activities, the lessee and the district will develop

mutually agreed upon terms and schedules of payment to provide such facilities as required and in compliance with the codes and requirements of the municipality of... to the degree that they apply to any such construction or development.

8. All terms and conditions will be developed contingent upon mutual agreement of the parties.

Donald L. Lambert
School of Education
Administration and Supervision
Doctor of Education

APPROVAL SHEET

The dissertation submitted by Donald L. Lambert has been read and approved by the following committee:

Dr. Melvin P. Heller, Professor and Chairman Department of Administration and Supervision, Loyola

Dr. Jasper J. Valenti, Professor Department of Administration and Supervision, Associate Dean, School of Education, Loyola

Dr. Philip M. Carlin, Associate Professor Department of Administration and Supervision, Loyola

The final copies have been examined by the director of the dissertation and the signature which appears below verifies the fact that any necessary changes have been incorporated and that the dissertation is now given final approval by the Committee with reference to content and form.

The dissertation is therefore accepted in partial fulfillment of the requirements for the degree of Doctor of Education.

Date

April 6, 1978

Director's Signature

