

## Revisiting School District Consolidation Issues

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### UPCOMING POLICY BRIEFS . . .

- ✓ *An Update on Childhood Obesity Trends*
- ✓ *Trends in Alternative Teacher Certification for Elementary and Secondary Teachers*
- ✓ *College Persistence and Completion Strategies: Opportunities for Scaling Up*

### INTRODUCTION

In light of a slow economic recovery from the Great Recession, state and local governments are faced with the challenge of providing services to citizens amidst ongoing budgetary woes. For instance, although the most recent Indiana revenue collections for the month of August were above revised projections to help start fiscal year 2011 (which commenced July 1, 2010), the state’s revenues were far below amounts anticipated for the fiscal year 2010 budget. In total, revenue for fiscal year 2010 was \$957 million less than budgeted and state revenues have dropped 14.3 percent over the past two years (Berry, 2010). States across the nation face estimated aggregate budget gaps of over \$83 billion for the 2011 fiscal year (National Conference of State Legislators, 2010).

In the current economic climate it is increasingly important for all levels of government to maximize efficiency and minimize costs wherever possible to prevent further service reductions or the necessity for a tax increase. School and school district consolidation has been debated as a potential source of cost savings for local and state governments. School and school district consolidation is the process of combining schools and/or school district administrative functions for the purpose of improving operating efficiency and/or expanding educational opportunities. The potential for cost savings through consolidation must be examined with respect to the impact such consolidation may have on student achievement.

Recently, states have taken varying approaches to promoting consolidation at the school and district level. This policy brief provides a concise summary of the research on school and school district con-

solidation and a synopsis of the consolidation legislation passed in other states, with an emphasis on Maine, before analyzing legislative proposals and research specific to Indiana. A summary of school district consolidation feasibility studies conducted in Indiana is also included.

### THE RESEARCH ON SCHOOL AND DISTRICT CONSOLIDATION

Over the course of the 20<sup>th</sup> century, public education across the nation transformed from a fragmented, localized form of governance into a consolidated, centralized one (University of Buffalo Regional Institute, 2009). As recently as the 1930s, the majority of schools in America employed only one teacher. The number of public schools across the country has steadily declined, moving from a peak of 271,000 schools in 1920 to only 83,000 in the late 1980s (Berry, 2004). Between 1929 and 1969, public school attendance doubled. The rapid rate of school consolidation, combined with the dramatic growth in attendance, created a five-fold increase in school size, with average daily attendance increasing from 87 to 440 students (Berry, 2004). Additionally, by 1980 “the nation’s public schools were spending nearly 10 times as much per student as they had in 1920, even after adjusting for inflation” (Coulson, 2007).

According to early 20<sup>th</sup> century education reformer Ellwood P. Cubberly, there were three distinct advantages of larger schools: 1) a reduced ratio of administrators to teachers, creating a more centralized and efficient system of administration; 2) more specialized instruction, achieved by dividing students based on age, subject area, and ability; and 3) better facilities at lower costs (Berry, 2004). Creating large schools

in order to benefit from these perceived advantages required that many schools, as well as school districts, consolidate.

The University of Buffalo Regional Institute (2009) identified several factors that facilitated this transition to larger consolidated school districts:

A number of forces prompted and enabled the pooling of students into larger districts during the 20<sup>th</sup> century, including greater expectations for the quality, comprehensiveness, and duration of schooling in industrial societies; calls from state officials and academics for more efficient and professionalized management of schools; falling enrollment in rural communities as population shifted to urban areas; and, not least, the emergence of school buses and good roads to transport students to centralized classrooms.

As schools and districts consolidated, the responsibility for day-to-day operations and the general authority over the schools were transferred from elected school boards to professional superintendents and administrators (Berry, 2004). This change served to both increase state control over education and professionalize the education system.

Historical and contemporary proponents of centralization and consolidation point to the potential cost savings through economies of scale and increased educational opportunities (University of Buffalo Regional Institute, 2009). Duncombe and Yinger (2005) identify five potential areas which may experience gains from economies of scale: indivisibilities, increased dimension, specialization, price benefits of scale, and learning and innovation. Indivisibilities exist when the provision of services to each student does not diminish in quality as the number of students being served increases. For example, regardless of a school district's size, there is still a need for a superintendent within the school's central administration.

Increased dimension refers to the capital structure of a school and savings resulting from additional students utilizing the same facilities (e.g., computer labs, heating plants, gymnasiums). Specialization may occur if, through consolidation, schools are able to employ teachers that can provide more specialized instruction (e.g., math,

technology, science), especially at the high school level. Price benefits of scale can be achieved by negotiating bulk purchase agreements or employee contracts. Finally, Duncombe and Yinger argue that learning may increase if employees can draw on the experiences of the greater number of colleagues within a larger school. Similarly, the costs of implementing new innovations and changes will decline with experience, so a larger district may be able to implement innovations at a lower overall cost (Duncombe & Yinger, 2005).

Nevertheless, consolidating does not inherently produce these benefits and may generate additional costs. The costs associated with consolidation may include additional busing, new facilities, and 'leveling-up' salaries to that of the higher paying district or school. Additionally, consolidation may create diseconomies of scale, which may produce labor relations effects, lower staff motivation and effort, decrease student motivation and effort, and reduce parental involvement (Duncombe & Yinger, 2005). Labor relations effects may result from larger districts organizing teachers' unions. Staff motivation and effort is susceptible to negative attitudes individuals may have about working in larger schools, as well as the increased levels of middle management in larger schools.

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Students in smaller schools have increased opportunities to participate in extracurricular activities, and also have a greater sense of belonging. A larger school may instill the opposite feeling, which could decrease motivation and effort on the part of the students. Parental involvement may decrease if participation is viewed as less rewarding or more difficult in larger districts. Because district and school consolidation is associ-

ated with both increased savings and additional costs, it is necessary to weigh the costs and benefits of consolidation on a case-by-case basis (Duncombe & Yinger, 2005).

In a study to examine if consolidating smaller school districts in Michigan would save taxpayers money, Andrew Coulson estimated the most cost-effective school district size in Michigan and the cost savings that would result from merging small districts and breaking up excessively large districts. From his analysis, Coulson found that the most cost-effective district size for schools in Michigan was 2,900 students. Districts that were either larger or smaller in size would generate higher per-pupil costs (Coulson, 2007).

Consolidating smaller school districts to achieve this optimal size was estimated to result in a cost savings for the state of Michigan and local governments of approximately \$31 million annually. In comparison, breaking up large school districts would produce an annual savings of \$363 million. The savings from breaking up large districts is estimated to be 12 times greater than the savings that would be generated from merging small districts. Coulson cautions that these savings are conditional on whether districts can achieve the optimal size of 2,900 students. Savings would only be maximized by merging districts that would result in a combined district with 2,900 students or breaking up larger districts to generate multiple 2,900 student districts. Because of political and geographic constraints, consolidating or breaking up districts to achieve this optimal size is not feasible in all cases and, consequently, the cost savings from restructuring districts on account of size are likely to be significantly less (Coulson, 2007).

The results of Coulson's research in five states (New York, Florida, California, Texas, and Michigan) have varied (Weidenbener, 2007). In three of the states, Florida, California, and Texas, he could not find an optimal size. However, in New York and Michigan Coulson found the optimal size for district efficiency to be 3,380 and 2,900 students, respectively. But when student achievement was included in the analysis, Coulson found no significant correlation between size, efficiency, and achievement (Weidenbener, 2007). Coulson concluded that, "No correlation or a negative correlation exists with cost effi-

ciency and size ... If the goal is to save tax revenues, then deconsolidation is a better option.” (A. J. Coulson, personal communication, December 10, 2008).

In analyzing the optimal size for Indiana school corporations, Timothy Zimmer found results consistent with those of Coulson’s Michigan analysis. In one model, Zimmer found the optimal school corporation enrollment size — taking into account both per-pupil costs and student achievement — to be 1,942 students, with a cost of \$9,413.93 per student. However, the 95<sup>th</sup> percentile confidence interval identified the optimal enrollment range to be 1,000 to 3,000 students. Beyond this range in either direction, diseconomies of scale with regard to both cost and student performance emerge (Zimmer, 2007). At the time of his analysis, 45 school corporations, which constituted approximately 15.4 percent of corporations in Indiana, had enrollment levels of less than 1,000 students. For these small corporations, the potential benefits of district consolidation due to economies of scale are said to be greatest.

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Zimmer acknowledges that although the potential for cost savings through consolidation exists, the small size of these districts results in relatively small overall savings. When Zimmer examined the relationship between school corporation size and student achievement, he found that “increased enrollment due to consolidation of school districts is likely to have a negative effect on student performance.” As a school corporation increases in size, attendance rates and parental involvement were found to decrease. These outcomes negatively impact student performance (Zimmer, 2007).

Researchers examining school consolidation between the 1920s and 1970s focused on the impact consolidation had on the distribution of resources rather than on the effect it had on student achievement. With regard to resources, researchers found that “larger schools had better facilities, more highly qualified teachers and administra-

tors, a greater depth and variety of courses, and more extracurricular activities” (Berry, 2004). However, up to this point the relationship between student achievement and school and district size has been largely unexamined.

In the 1980s, researchers started to analyze this relationship, but have produced inconsistent results. An examination of literature by the Center for Evaluation & Education Policy (CEEP) found that about half of student achievement research demonstrates no difference in achievement due to school size, while the rest suggests higher achievement rates in smaller schools (Plucker et al., 2007). In making decisions concerning school and district consolidation, research regarding the potential for cost savings, as well as that addressing the impact on student achievement, needs to be considered.

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### **RECENT HISTORY OF STATEWIDE SCHOOL DISTRICT CONSOLIDATION IN MAINE**

Consolidation legislation has been enacted and introduced in several states across the country (see Table 1). In 2007, the Maine legislature passed a consolidation legislation requiring school districts to enroll at least 2,500 students (The Rural School and Community Trust, 2009). In passing this mandate, Maine undertook one of the most aggressive comprehensive reorganization reforms to date that merits further examination.

Initially when the law was proposed, Governor Baldacci intended to consolidate the state’s 290 districts into approximately 80 districts. The policy objective of the law was to require all school units, regardless of size, to: “1) Work with other units to reorganize into larger, more efficient units; or 2) Where expansion of the unit would be impractical or inconsistent with state policy, reorganize their own administrative structures to reduce costs” (Summary of Reorganization Law, 2010).

The law was amended in 2008 making compliance more feasible for districts throughout the state. As amended, the law stated, “Existing school units should aim to form regional school units of at least 2,500 resident students, except where geography, demographics, population density, trans-

portation challenges, and other obstacles make 2,500 impractical. Where 2,500 [students] is impractical, the units must create [Regional School Units] RSUs of at least 1,200 students” (Summary of Reorganization Law, 2010). The law also included a provision allowing school units to propose alternative organizational structures (AOS), which would exempt the school unit from the consolidation mandate but would still require the unit to improve efficiencies. These alternative plans require the approval of only the Commissioner of Education, not the voters. High-performing districts were also exempt from the consolidation requirements.

The law included exemptions from the minimum size requirement for isolated rural communities, permitting these communities to form districts with less than 1,200 students but no smaller than 1,000 students. Another exemption allowed for ‘doughnut hole’ districts — districts that have been rejected by all surrounding districts for consolidation plans. These ‘doughnut hole’ districts will not be penalized if they document their consolidation efforts and submit a plan detailing alternative ways to meet efficiencies. Additionally, offshore islands and tribal schools are not subject to the minimum size requirement.

According to the legislation, school units that did not approve a reorganization plan by July 1, 2009, and that did not form approved regional units by the beginning of fiscal year 2010, would face penalties including loss of subsidies, reduced funding, less favorable consideration for construction projects, and loss of transition adjustments.

The reorganization plan emphasizes protection against closing schools or displacing teachers or students. The law delineates that schools cannot be closed without a two-thirds vote by the regional board as well as a vote by the municipality. The plan also states that teachers and other school employees “will be transferred to the new unit, and will retain their rights under collective bargaining contracts” (Summary of Reorganization Law, 2010).

All reorganization plans require voter approval. School administrative units (SAUs) that are part of a proposed RSU must hold a referendum.

*(continued on page 5)*

**TABLE 1. Current School District Consolidation News from Across the United States**

Enacted Legislation			
Arkansas	April 2007	SB 713	Creates academic support centers for students attending consolidated schools.
	April 2007	HB 2751	Authorizes a transportation study examining length of time and cost of transporting students to consolidated school districts, isolated school districts, and school districts with declining enrollment (Arkansas House Bill 2751, 2007).
Idaho	April 2008	HB 618	Revises the number of board of trustees members and the process by which members are appointed for school districts created by consolidation (National Conference of State Legislatures, 2008).
	April 2009	SB 1078	Provides that the majority of voters in both school districts must vote in favor of school district consolidation for it to occur. If one district has an outstanding debt, the debt will remain the responsibility of the properties owned by the indebted corporation.
Iowa	April 2009	SB 360	Addresses accreditation, dissolution, and school district reorganization. The accreditation committee must specify the conditions the school district must satisfy to remain accredited. In the case that a school district loses its accreditation, the bill outlines the process for dissolution and reorganization (Iowa State Senate File 360, 2009).
New York	March 2010	S5523A	Establishes the Education Mandate Relief Act of 2010, enabling the board of education to arrange shared contracts with other school districts for transportation services. Also provides for the state's Board of Cooperative Educational Services to convene committees to recommend options for school districts to consolidate and share services (New York Open Senate, 2010).
Rhode Island	June 2007	HR 5766	Creates a special legislative commission to study the possibility of consolidating Rhode Island's school districts (National Conference of State Legislatures, 2007).
South Dakota	March 2007	HB 1082	Requires school districts with enrollment below 130 students to consolidate with a neighboring district. Includes provisions allowing consolidation to occur over two years. School districts spanning 400 miles or more are exempted. Consolidated districts are awarded extra funding (South Dakota House Bill 1082, 2007).
Vermont	June 2010	HB 66	Encourages school districts to consolidate through an incentive that reduces property taxes and provides grants to help districts transition. Vermont Governor James Douglas, who was dissatisfied with the legislation because it did not include measures for mandatory consolidation, higher teacher-to-pupil ratios, or reduced state aid for small schools, allowed it to become law without his signature (Porter, 2010).
Wisconsin	October 2007	Act 20	Includes \$250,000 in the 2007-09 budget bill for one-time grants of up to \$10,000 each for school district consolidation studies during the 2008-09 fiscal year (Wisconsin Department of Public Instruction, 2009).
Introduced Legislation			
Arkansas	April 2009	HB 2263	Improves school districts' chances of avoiding forced consolidation. Currently, if a corporation's enrollment falls below 350 students for two consecutive years (not taking into account the fourth quarter), the corporation is subject to mandatory consolidation. HB 2263 would require enrollment to be under 350 in all quarters for two consecutive years (Lyon & Moritz, 2009). It was rejected by the Senate (Moritz, 2009) although it passed the House 89-8.
	May 2009	Proposal	Authorizes a study of isolated school districts and the potential effects of consolidation (Associated Press, 2009).
Delaware	May 2009	SB 95	Called for consolidation of existing school districts into three county-wide districts and one vocational district (Price, 2009). Sen. Karen Peterson (D) estimated this consolidation could save the state \$40 to \$50 million per year (Staff, 2009).
Illinois	2009	SB 1719	Stipulates that consolidation of school districts will only be considered if 50 resident voters in the affected area sign a petition (Illinois State Senate Bill 1719, 2009). Introduced by Sen. Majority Leader James Clayborne, Jr. (D).
Kansas	March 2010	HB 2728	Enables an appointed state commission to reorganize all K-12 school districts in the state every 10 years so no district has fewer than 10,000 students. Requires the Kansas Board of Education to enforce a uniform system of accounting for districts to report expenditures and revenues to the state (Kansas Votes, 2010). Introduced by Rep. Kevin Yoder (R).
New Mexico	2009	SB 255	Requires state funds cannot be used to construct high schools with more than 225 students per grade. Additionally, consolidating districts would have to prepare a report on the consolidation's effect on students, which must meet approval of the New Mexico Secretary of Education (Rural School and Community Trust, 2009; Smaller Schools, 2009).
Pennsylvania	April 2009	SB 833	Creates a commission to study and develop a plan for consolidating the state's 501 school districts. Governor Rendell called on the legislature to reduce the number of school districts to 100 in his February budget report (Hardy, 2009). Introduced by Sen. John Wozniak (D).
Rhode Island	2009	Governor proposal	Gov. Don Carcieri (R) submitted legislation creating a commission to study the feasibility of reconfiguring the state's public school system. The report's completion date was March 2010. In addition, Gov. Carcieri has proposed saving costs by forcing school districts to purchase supplies jointly, enroll teachers in a common health insurance plan, centralize meal services, and participate in one statewide busing contract (Henry, 2009).
Vermont	2010	HB 755; SB 252	Reduce the number of school governing units from 260 to between 14 and 16 (Remsen, 2010). Introduced by Sen. Bob Hartwell (D) and Rep. Heidi Scheuermann (R).

(continued from page 3)

As of March 2009, voters had rejected 22 of 46 proposed regional school units involving their local school districts. By March 2010, voters had rejected Department of Education approved plans affecting 107 districts (Maynard, 2010).

The state aid withheld from districts that do not have approved regional plans will be paid instead to districts with voter-affirmed consolidation plans. Although a large number of regional consolidation plans had failed, Maine education officials claimed that 80 percent of the state's students were attending districts in compliance with the law. The Rural School and Community Trust contends that two-thirds of the students in districts in compliance with the law are actually in districts that remained exempt from consolidation through alternative plans (Rural School and Community Trust, 2009).

Critics of the consolidation legislation assert that larger cities and wealthier communities that do not want to share resources with poorer neighboring districts were able to escape consolidation through the alternative plan provision.

Concern about the consolidation legislation culminated in an initiative to repeal the law. The Maine Coalition to Save Schools gathered 60,000 signatures on an initiative to repeal the law on the November 2009 ballot. In opposition to this initiative, the group Maine People for Improved Education spent \$300,000 to run ads encouraging voters to oppose repealing the law. The initiative to overturn the consolidation law was defeated 58 percent to 42 percent, despite having more towns vote to repeal the law (270 towns) than to keep the law (222 towns) (Rural School and Community Trust, 2009) (see Table 2).

With the repeal referendum now defeated, the Maine Department of Education is working to support the reorganized units and to assist non-conforming units to develop reorganization plans (School Administrative Reorganization, 2009). As of March 22, 2010, Maine has reduced the number of school units from 290 to 215 (Maynard, 2010). Since it is too soon to determine the actual cost savings that will result from the consolidation mandate, controversy surrounds the question of whether the legislation will generate the proclaimed amount of cost savings.

The results of a 2009 National Association of School Administrators survey have raised concerns that the limited flexibility districts have in how they spend their money inhibits their ability to reduce costs (Maynard, 2010). Despite this challenge, the Maine Department of Education provides evidence that cost savings through revised insurance contracts, consolidated administrative functions, and combined operations is being realized by reorganized districts (School Administrative Reorganization, 2009). In contrast, opponents of the consolidation mandate contend that the actual cost savings will be significantly less than Governor Baldacci's of Maine original estimate (Rural School and Community Trust, 2009). Nevertheless the Maine Department of Education maintains that "as a result of the reorganization law, Maine is better prepared to meet the current economic and educational reform challenges facing our state and country" (School Administrative Reorganization, 2009).

## RECENT HISTORY OF SCHOOL DISTRICT CONSOLIDATION IN INDIANA

A renewed interest in exploring the potential for school corporation consolidation and collaboration in Indiana has surfaced in recent years. Since the passage of the School Corporation Reorganization Act of 1959, which was the catalyst for reducing the number of school corporations in Indiana from approximately 900 to the 292 operating today, the Indiana General Assembly (IGA) remained relatively silent on the issue of school corporation consolidation. Renewed debate and discussion on consolidation began in 2005 with the inclusion of a provision in the state biennial budget that called for the study of school corporation central office consolidation. Multiple efforts have ensued since that

time, mostly focused on convening stakeholder groups to discuss consolidation and shared service ideas, publishing school district expenditures, and funding feasibility studies. However, legislative proposals to mandate consolidation have failed in successive sessions.

In July 2005, State Senator Luke Kenley chaired a work group charged with the identification of cost reduction measures through consolidation of school corporation central office services. CEEP convened the work group to investigate ways small school corporations could take advantage of cost savings through economies of scale available to larger school corporations. The work group identified a number of strategies to address the obstacles to central office consolidation, including the identification of best practices for cooperative agreements, service sharing, and fund transfer flexibility.

In addition, the IGA established the K-12 Education Subcommittee of the Indiana Government Efficiency Commission to examine funding and budgeting related to non-classroom K-12 education expenditures. The subcommittee conducted several meetings commencing in the fall of 2005 and concluded its work with the submission of a final report to Indiana Governor Mitch Daniels in November 2006. The report suggested that there was potential for cost savings through privatizing some services, such as transportation, as well as streamlining the competitive bid process for awarding construction projects to private companies. The report also found administrative costs to be in need of reduction and suggested structural realignment as a possible reform. Another recommendation was that school corporations with low pupil enrollments or high occupancy costs should consider consolidating with another school corporation. Although the subcommittee emphasized that consolida-

**TABLE 2. Votes to Repeal Maine Consolidation Legislation**

	Voted to Repeal the Law	Voted in Favor of Keeping the Law
Towns Not in Compliance with Law	188	9
Towns Exempt from Law	47	123
Towns that have Experienced Consolidation	35	90

Source: The Rural School and Community Trust, 2009, *Maine Consolidation Repeal Effort Goes Down to Defeat*.

tion was not a cure-all for high costs, the report recognized that in some situations it may be an appropriate solution.

To further promote cost efficiency, the 2006 IGA passed House Enrolled Act (HEA) 1006, hereafter referred to as Public Law (P.L.) 191, making instructional and non-instructional expenditures more transparent. P.L. 191 required the classification of all school expenditures into one of the following four categories: student academic achievement expenditures, student instructional support expenditures, overhead and operational expenditures, and nonoperational expenditures.

Table 3 illustrates school corporation expenditures by P.L. 191 categories. Between 2006 and 2007 the ratio of student instructional expenses to all other expenses increased by 0.8 percent. However, between 2007 and 2008 the ratio declined by 0.8 percent, reverting back to the 2006 level of 60.6 percent.

The emphasis on transparency and efficiency, as evidenced by the K-12 Education Subcommittee of the Indiana Government Efficiency Commission report and P.L. 191, generated further interest in the potential savings assumed possible through school corporation consolidation. This interest culminated with the appropriation of \$100,000 per year to the Indiana Department of Education, provided by the 2007 state budget bill (House Bill 1001-2007) for school corporations to conduct consolidation feasibility studies during the 2007-08 and 2008-09 school years (Plucker et al., 2007).

### SCHOOL CORPORATION CONSOLIDATION IN INDIANA: FEASIBILITY CASE STUDIES

School corporations interested in studying the feasibility of merging or consolidating

services with another school corporation were invited to apply for a one-year grant from the Indiana Department of Education (IDOE) for up to \$25,000 to help offset the costs of the study. Study proposals were required to explain how consolidation or merging services would enhance educational opportunities for students, the benefits it would bring to the school corporations involved, and a timeline for completing consolidation or merging of services (Regnier, 2008). Eight studies, four in each of the 2007-08 and 2008-09 school years, were conducted under the IDOE grant program. Each of these studies lasted for one school year and was conducted by a third-party entity. Of the eight studies, five focused primarily on sharing services, one emphasized consolidation, and two studies were dedicated equally to sharing services and exploring areas for consolidation.

Findings from the studies varied from corporation to corporation. In general, the studies found that academic offerings for students could be enhanced through shared services. Specifically, options of open enrollment, half-day scheduling, and online instruction between schools could increase curriculum offerings. Sharing personnel in the positions of business manager and technology coordinator was suggested as a way to reduce costs without decreasing services. Several of the studies recommended consolidation of administrative functions; however, none of the studies recommended consolidating schools in the near future without further analysis. (See pages 8-11 for the consolidation feasibility study summaries.)

### 2009 LEGISLATIVE PROPOSALS MANDATING DISTRICT CONSOLIDATION

In a similar fashion to how the grants for feasibility studies have helped further the interest of school leaders in exploring the potential gains from consolidation, the introduction of new legislation has continued the debate regarding school corporation consolidation initiatives in Indiana. As part of the 2009 legislative session, two Senate bills concerning school corporation consolidation were introduced but not passed. (Analysis of Senate Bill 502 can be found on page 14.)

### Analysis of Indiana Senate Bill 521

Senate Bill 521, as proposed, would have required “school corporations with an average daily membership (ADM) of less than 500 students to merge with another school corporation or school corporations” (Indiana State Senate Bill No. 521, 2009). The bill also required that a county committee must prepare a comprehensive reorganization plan, hold public hearings on the plan, and gain approval from the Indiana State Board of Education (SBOE) for the plan. The SBOE would provide school corporations that fail to reorganize by 2013 a comprehensive reorganization plan. The IDOE would establish standards for educational opportunity and operational efficiency. School corporations serving between 500 and 1,000 students would have to demonstrate to the IDOE that they met these established standards or be required to consolidate with another school corporation. The bill excluded charter schools from compliance with these provisions.

TABLE 3. School Corporations Expenditures by P.L. 191 Expenditure Categories\*

	Student Academic Achievement	Student Instructional Support	Overhead and Operational Expenses	Nonoperational	Ratio of Student Instr. Expense To All Expense
Expenditures FY 2006	54.3%	6.4%	21.3%	18.0%	60.6%
Expenditures FY 2007	54.9%	6.6%	21.2%	17.3%	61.4%
Expenditures FY 2008	53.2%	7.4%	22.1%	17.3%	60.6%

Source: Indiana Office of Management and Budget, Student Instructional Expenditure for 2007-08 School Year. January 1, 2009.

If passed, Senate Bill 521 may have required as many as 55 school corporations in Indiana to reorganize through consolidation. To analyze the potential impact of the proposed legislation, school corporations' Adequate Yearly Progress (AYP) status, achievement on Advanced Placement (AP) tests, ISTEP+ performance, and ratio of student instructional expenditures were examined by CEEP. Each of these factors is likely to have been part of the standards for educational opportunity and operational efficiency the IDOE would have been required to develop if SB521 had passed.

### Average Daily Membership (ADM) by the Numbers

ADM data from the IDOE for the 2008-09 school year indicated that when excluding charter schools, of the total 292 corporations, there were 48 corporations with ADM counts of less than 1,000 students (see Table 7).

Of these 48 corporations, six had ADMs of less than 500 students and 42 had ADMs between 500 and 1,000 students. Therefore, under SB521, six corporations would have been forced to consolidate and another 42 would have been required to show evidence that they met the specified standards or be required to consolidate as well.

### Adequate Yearly Progress (AYP) by Corporation Enrollment

Five of the six corporations with ADMs of less than 500 students made AYP in each of the four years between 2005 and 2008. The Dewey Township Schools Corporation, the sixth corporation with an ADM of less than 500, made AYP in 2005, 2006, and 2007, but not in 2008.

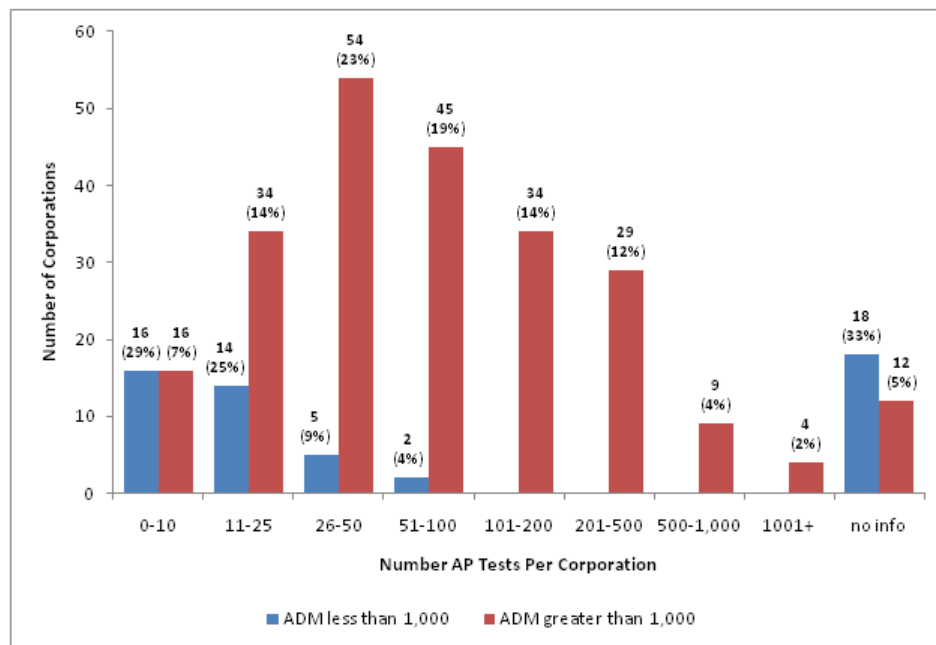
Each of the 42 corporations with an ADM between 500 and 1,000 students made AYP annually from 2005 to 2008. This result is likely because these school corporations generally have less diversity and fewer subgroups of students whose test results are included in the AYP calculations.

In 2008, of the 244 corporations with ADMs greater than 1,000, 49 corporations (20.1 percent of corporations, or one in five corporations) did not make AYP.

### Opportunities for Achievement as Measured by Advanced Placement Tests (AP)

The numbers of AP tests taken, as well as the results of these tests, are used to assess

**Figure 1. Number of AP Tests Taken and Corporation Size**



Source: Indiana Department of Education, Compare School Corporations, <http://mustang.doe.state.in.us/SAS/sas1.cfm>

the extent of advanced curriculum offerings and student achievement. It is argued that smaller school corporations offer fewer courses, especially advanced courses, at the high school level.

Figure 1 illustrates the number of AP tests taken by corporations within each of the two corporation size categories. For example, 16 school corporations with an ADM less than 1,000 students had between 0 and 10 AP tests taken during the 2007-08 school year. Only one school corporation with an ADM of less than 500 reported AP data. The findings for school corporations of this size are inconclusive and cannot be generalized.

The percentages of all corporations in each ADM category are included in the figure parenthetically. Using percentages helps to control for the discrepancy in the number of corporations in each ADM category. For example, four percent of corporations with an ADM less than 1,000 had 51-100 AP tests taken during the 2007-08 school year. A total of 19 percent of corporations with an ADM greater than 1,000 also had between 51 and 100 AP tests taken. These data are illustrative of the overall trend of larger school corporations having a greater number of tests taken.

Figure 2 shows the percentage of a corporation's Grades 11 and 12 students taking AP tests. For example, 24 corporations

with an ADM greater than 1,000 had between 21 percent and 30 percent of 11<sup>th</sup> and 12<sup>th</sup> grade students taking AP tests.

These same results, but in terms of percentages of all corporations in each ADM category, are included in the figure parenthetically. Using percentages helps to control for the discrepancy in the number of corporations in each ADM category. To illustrate, 42 percent of corporations with an ADM less than 1,000 had between 0 and 10 percent of 11<sup>th</sup> and 12<sup>th</sup> graders taking AP tests. Similarly, 41 percent of corporations with an ADM greater than 1,000 also had between 0-10 percent of 11<sup>th</sup> and 12<sup>th</sup> grade students taking AP tests.

Figure 2 shows that in the majority of school corporations, both those with an ADM less than 1,000 and those with an ADM greater than 1,000, have a relatively small percentage of 11<sup>th</sup> and 12<sup>th</sup> graders taking AP tests.

In order to be eligible to receive college or advanced credit, a student must score a 3 or higher on the AP test. Figure 3 captures the number of school corporations in each ADM category by the percentage of AP tests taken within each corporation scoring a 3 or better.

(continued on page 12)

## 2007-08 Consolidation Feasibility Studies

### Randolph Central, Randolph Eastern, Randolph Southern, and Union School Corporations

	Randolph Central	Randolph Eastern	Randolph Southern	Union
Enrollment 07-08:	1,699	1,009	929	438
Projected Enroll 2012-13:	1,758	968	554	413
Number of Schools:	1HS, 1 MS, 3 ES	1HS, 1 MS, 1 ES	1 Jr/Sr HS, 1 ES	1 Jr/Sr HS, 1 ES
Expenditure Per Pupil:	\$8,965	\$9,530	\$9,358	\$9,909
% Free Lunches/Textbooks:	47%	59%	37%	41%



This study examined how the educational opportunities provided to students in the four school corporations could be enhanced amid declining enrollment levels throughout Randolph County. Some of the study's recommendations for the next two years included aligning school calendars and daily schedules, instituting open enrollment policies for all Randolph County School corporations, centralizing and expanding summer school programming, training staff on common software and management programs, and standardizing the curriculum.

The study advocated consolidating the four current school corporations into one new school corporation in three to five years. One school board responsible for the operation of all of the schools in the corporation would be created and the four central administration offices should be consolidated into one. The master contracts could be renegotiated as one contract for the entire corporation. This consolidation would also create opportunities to centralize transportation, technology, maintenance, and cafeteria services.

Long-term planning (six years and beyond) advocated in the study recommended that the school corporations evaluate enrollment levels and academic offerings prior to committing to renovations at any of the high schools, consider the possibility of building a career center for the county, and in the event of high school consolidation use the vacated building for other educational purposes such as alternative or career programs.

As of May 2010, the school corporations involved in the study have adopted textbooks together, built a common school calendar for the county, implemented a shared summer school program, adopted resolutions calling for common high school schedules to more easily allow for the sharing of students and staff, and arranged for joint purchasing/bidding of food for the cafeterias. In addition, Randolph Central and Randolph Eastern successfully partnered in applying for an "Enhancing Education through Technology" grant from the Indiana Department of Education. Two of the smallest schools, Union and Randolph Southern, are moving forward with plans for actual consolidation of central office administration, and becoming one new consolidated district. Future goals based on an April 2010 meeting include working together to establish a career and technical program in Randolph County, investigating the possibility of using current high school facilities to establish specialty schools, and continuing to explore distance learning as a way to increase course offerings.

### Monroe Central Community Schools and Union School Corporation

	Monroe Central	Union
Enrollment 07-08:	993	438
Projected Enroll 2012-13:	971	413
Number of Schools 07-08:	1 Jr/Sr HS, 1 ES	1 Jr/Sr HS, 1 ES
Expenditure Per Pupil 07-08:	\$9,601	\$9,909
% Free Lunches/Textbooks 07-08:	46%	41%



Union School Corporation also participated in a feasibility study in 2007-08 with Monroe Central Community Schools, another school corporation in Randolph County, to identify potential areas for collaboration and shared services, as well as to examine the feasibility of combining the two school corporations into one.

The study recommended that the school districts align their schedules and academic calendars to increase curriculum offerings between schools. Specifically, this move would create an opportunity for Union students to take Advanced Placement (AP) and Advanced College Project (ACP) courses and for Monroe Central students to take industrial technology courses. The study also suggested that there are potential cost savings in sharing transportation facilities and maintenance. Other possible areas for collaboration included sharing a curriculum director, creating joint opportunities for professional development, investigating opportunities for libraries to be maintained as public libraries as well as school libraries, and the repair and maintenance of technological equipment. The study identified that long term, the school corporations need to consider consolidating the two corporations and combining their high schools potentially as soon as the 2010-11 school year.

Since the consolidation study, the two school corporations have increased their shared services. They are sharing certified specialists, such as a speech language pathologist, that neither corporation could afford individually. Union students were able to attend the summer agriculture education program at Monroe Central. In addition, Union students are able to attend courses at Monroe Central, such as physics, that are not offered at their home school.

### Cowan Community Schools and Daleville Community Schools

	Cowan	Daleville
Enrollment 07-08:	718	672
Projected Enroll 2012-13:	774	670
Number of Schools 07-08:	1 Jr/Sr HS, 1 ES	1 Jr/Sr HS, 1 ES
Expenditure Per Pupil 07-08:	\$9,273	\$10,779
% Free Lunches/Textbooks 07-08:	23%	32%



School corporations throughout Indiana face the challenge of satisfying increasing curriculum requirements with limited monetary and personnel resources. To find ways to address this challenge, the Cowan and Daleville Community School Corporations in Delaware County conducted a consolidation feasibility study to examine the potential to expand opportunities for their students through maximizing the available resources of the two corporations.

Prior to the study, the two school corporations took steps to expand educational opportunities for their high school students by allowing them to take course offerings at the other high school through an informal agreement. Although the shared course offerings had some success, the study offered several recommendations in the following four areas for how the school corporations may collaborate to further increase educational opportunities for students: shared course offerings, dual credit offerings, shared corporate personnel, and shared instructional personnel and resources.

To enhance shared course offerings, the study suggested that the school corporations adopt the same calendar and schedule, provide transportation between the schools for students, implement a half-day model where students would have the option of spending half of the school day taking courses at the other high school, utilize distance learning opportunities, establish a committee to assess joint textbook adoption, and upgrade to a joint student data system. Dual credit offerings could be expanded through increasing ACP programs and enhancing partnerships with Ivy Tech. To streamline administration and save money, the study advocated having one shared employee for each of the positions of chief financial officer, technology director, maintenance director, and transportation supervisor. With regard to sharing instructional personnel and resources, the study recommended offering a joint summer school program, combining professional development opportunities, housing special education pull-out programs in one location, and identifying individuals who, when filling vacancies, could teach in both districts. The study also identified expanding common purchasing and creating a unified health insurance plan as areas in which the corporations could benefit by taking advantage of economies of scale.

In addition to continuing to provide shared curriculum offerings to students, the school corporations are furthering discussions with respect to sharing personnel as well as looking into the possibility of sharing classes through the use of technology.

### White County (Frontier, North White, Tri County, and Twin Lakes) School Corporations

	Frontier	North White	Tri County	Twin Lakes
Enrollment 07-08:	831	1,026	788	2,612
Projected Enroll 2012-13:	764	894	761	2,506
Number of Schools:	1 Jr/Sr HS, 1 ES	1HS, 1 MS, 3 ES	1 Mid/Sr HS, 1 Int, 1 Pr	1 HS, 1 MS, 4 ES
Expenditure Per Pupil 07-08:	\$9,627	\$11,835	\$12,860	\$10,064
% Free Lunches/Textbooks:	26%	62%	36%	46%



The purpose of this study was to identify opportunities for merging services or consolidation that would redirect more dollars to support classroom instruction. The study found that both the general population and student enrollment for White County are projected to decrease through the 2017-18 school year.

The existing collaborative efforts between the school districts of White County include participating in vocational and special education cooperatives, providing combined staff development opportunities through the Wabash Valley Education Service Center, using central purchasing, and lowering insurance costs through an insurance trust.

The study identified many scenarios that exist for school consolidation in White County. It was recommended that individual school boards examine the merits of the various consolidation scenarios on the basis of criteria such as what each district is willing to change or reorganize to gain cost savings, what provides the most effective way to coordinate programs and services between county schools and districts, and what offers the most improved learning opportunities and is in the best interest of the students.

The study drew attention to the possibility of increasing collaboration with Ivy Tech to expand educational opportunities for students and adults in the county, as well as the likelihood that future technological advancements will create additional distance learning and collaboration opportunities.

The process of increasing collaboration between school corporations in White County has begun by opening enrollment for all summer school courses, conducting combined bus inspections, collaborating on a grant to increase technology throughout the county, and adopting a common school calendar in at least three of the four school corporations. The four school corporations in White County meet on a regular basis to discuss ways to increase sharing of services and personnel.

## 2008-09 Consolidation Feasibility Studies

### Rockville, Turkey Run, and SW Parke Community School Corporations

	Rockville	Turkey Run	SW Parke Co
Enrollment 07-08:	889	612	933
Projected Enroll 2012-13:	873	591	900
Number of Schools 07-08:	1 Jr/Sr HS, 1 ES	1 Jr/Sr HS, 1 ES	1 Jr/Sr HS, 2 ES
Expenditure Per Pupil 07-08:	\$11,577	\$10,266	\$10,658
% Free Lunches/Textbooks 07-08:	42%	57%	57%



With the underlying purpose of expanding student programs and educational opportunities, the three Parke County school corporations conducted a study to assess the potential for merging services and administrative positions. This feasibility study is especially timely given the changing demographic composition of the Parke County population. Over the next 10 years, enrollment for the three school corporations in Parke County is expected to drop between nine and 12 percent. Furthermore, since 1999, the percentage of students living in poverty in Parke County has increased by 75 percent and unemployment rates have increased from 3.4 percent in 2000 to 11.2 percent in February of 2009.

Given the projected decline in student enrollment and the economic challenges in the county, assessing ways to increase educational opportunities while reducing costs is of great pertinence to the Parke County School Corporations. The study recommends that at a minimum Parke County school corporations expand their collaborative efforts to provide more program opportunities to students. These efforts would consist of coordinating their school schedules and calendars, developing a common curriculum, and utilizing the same textbooks and software programs. Additionally, the school corporations should increase the availability of summer school courses and collaborate to provide more high ability classes through sharing programs, participating in online and distance learning programs, and offering dual credit courses through college campuses.

The study suggests that ideally the Parke County school corporations would consolidate all administrative services and policy-making functions at the corporation level. This consolidation would result in the creation of one representative school board, one Parke County Superintendent of Schools, and one master contract and payroll and benefits package. The estimated cost savings of this administrative consolidation of between \$210,000 and \$250,000 would be redirected to upgrading student programs.

Since the feasibility study, the Turkey Run and Rockville high schools have incorporated joint course offerings into the student scheduling process. This summer the school corporations will be sharing a driver's education teacher. In the fall, Turkey Run students will be attending a speech class offered jointly by Ivy Tech and Rockville, through which they will be able to earn both high school and college credit. The corporations plan to continue having discussions about increasing shared services and resources.

### Clinton Central and Clinton Prairie School Corporations

	Clinton Central	Clinton Prairie
Enrollment 07-08:	1,065	1,003
Projected Enroll 2012-13:	1,003	1,005
Number of Schools 07-08:	1 Jr/Sr HS, 1 ES	1 Jr/Sr HS, 1 ES
Expenditure Per Pupil 07-08:	\$8,749	\$10,841
% Free Lunches/Textbooks 07-08:	31%	31%



This study investigated opportunities for sharing services and consolidating operations between two of the four school corporations in Clinton County (Clinton Central and Clinton Prairie) to eliminate duplication, reduce costs, and improve student success. The primary areas examined include potential gains and costs through changes in the availability of student programs through consolidation, sharing mental health and counseling services, providing joint preschool and kindergarten programs, expanding and improving virtual learning and technology, merging equipment purchases, sharing a transportation facility and non-route buses, sharing administrative and academic facilities (i.e. an auditorium, swimming pool, laboratories, office space, etc.), and potential benefits of combined staffing.

The two school corporations have been working cooperatively to provide common staff professional development programs through the Wabash Valley Education Service Center. Summer school programs have been open to students from both school corporations. The study also suggested that with the recent changes to the state's school funding formula, open enrollment between the school corporations may be a more feasible option.

The study found consolidating the school corporations to be an over-simplistic solution. Rather, the study's authors advocated for collaborative planning of programs and sharing operations and resources. Specifically, the study recommended creating a Common Curriculum Coordinating Committee, coordinating technology services through meetings between technology coordinators, holding quarterly meetings of the Consolidated and Shared Services Committee, co-convening both corporations' Boards of Education annually, initiating a combined preschool program, and consolidating administrative offices into one central location with separate spaces for each corporation.

The two school corporations have reviewed and agreed to the time lines and outcomes as proposed in the study.

### Rochester, Caston, and Tippecanoe Valley School Corporations

	Rochester	Caston	Tippecanoe Valley
Enrollment 07-08:	1,918	772	2,192
Projected Enroll 2012-13:	1,818	764	2,136
Number of Schools 07-08:	1 HS, 1MS, 2 ES	1 Jr/Sr HS, 1 ES	1 HS, 1 MS, 2 ES
Expenditure Per Pupil 07-08:	\$9,258	\$9,549	\$9,755
% Free Lunches/Textbooks 07-08:	45%	38%	44%



The purpose of the study was to identify opportunities for merging services to provide greater funding to support instruction in these three districts in Fulton and Kosciusko counties. The study identified the following four areas as having the most potential for merging services: corporate-level personnel, instructional personnel and instructional resources, course offerings in the high school curriculum, and joint service agreements.

With regard to sharing corporate-level personnel it was recommended that the three school corporations employ a chief financial officer/business manager, a director of technology, a maintenance director, and a transportation supervisor to serve the respective needs of all three corporations. Instructional personnel and resources could be shared by offering a joint summer school program in a central location for high school students and determining if individuals filling vacancies could share teaching responsibilities between corporations. High school curriculum offerings could be enhanced if the school corporations adopted a similar school year calendar and schedule for the school day, enabling them to share course offerings. Additionally, joint committees should be created for textbook adoption and curriculum formatting, distance learning opportunities should be expanded, and the three school corporations should adopt an open enrollment policy for all students. The study also suggested that the school corporations create a standardized benefit package for all employees and review service contracts to take advantage of economies of scale and reduce costs at the corporation level.

The study acknowledged the need for a population study to determine enrollment trends and the impact they may have on school funding. Furthermore, the research team also established that there was little to no interest in consolidating school programs between the corporations.

The school corporations have held a meeting in which the discussion centered on possible vendors and pricing for the population study, potential funding for planning and implementing various aspects of collaboration, and establishing short- and long-term goals. Short-term goals included touring the buildings in each of the districts, examining areas for transportation collaboration, investigating options for centralizing summer school operations, and sharing course offerings through open enrollment. Long-term goals included partnering between corporations to provide an alternative school.

### North Judson-San Pierre and Oregon-Davis School Corporations

	North Judson-San Pierre	Oregon-Davis
Enrollment 07-08:	1,437	722
Projected Enroll 2012-13:	1,246	694
Number of Schools:	1 HS, 1 MS, 1 ES	1 Jr/Sr HS, 1 ES
Expenditure Per Pupil 07-08:	\$8,954	\$9,655
% Free Lunches/Textbooks:	48%	45%



The purpose of the study was to explore ways merged or shared services could increase economic efficiency and improve the quality of services provided by these school corporations in Starke County. The study asserted that gains in economic efficiency would be generated by utilizing economies of scale and reducing duplication of personnel. In addition, improved services would result from redeploying existing fiscal and human resources to maximize benefits.

The study identified the following as areas where services are being duplicated by the school corporations: services rendered by the two central offices, course offerings, provision of student services (counseling, health care, extracurricular programming, and testing services), and arrangements for food, transportation, custodial, and maintenance services.

Currently, the school corporations are collaborating through sharing convocations and presentations, providing joint education services in special education (JESSE), participating in a dual credit program with area colleges, promoting the Starke County Initiative for Life Long Learning (SCILL), and offering the Marshall-Starke Head-Start program.

Those interviewed for the study recommended that the school corporations consider the following as potential areas for future collaboration and merging of services: providing a collaborative early childhood program, sharing technology and food service directors, developing collaborative grant proposals, creating opportunities for joint professional development, and sharing media resources. Academic offerings to students in both districts could be enhanced by increasing course offerings (business education, vocational, foreign language, advanced, and agricultural), expanding dual credit opportunities, and exploring distance learning possibilities.

The authors of the study drafted a joint resolution for merged or shared services, which would create a Joint Services Board composed of two board members and an alternate from both school corporations to further the discussion and investigation of merging or sharing services between the corporations. The school corporations are working to establish a joint committee to look at the possibilities for collaboration as recommended in the study.

(continued from page 7)

For example, 12 school corporations with ADMs less than 1,000 had between 0 and 10 percent of AP tests taken score a 3 or higher.

These same results, but in terms of percentages of all corporations in each ADM category, are included in Figure 3 parenthetically. Analyzing the data in percentage terms controls for the discrepancy in the number of corporations in each ADM category.

For example, four corporations, or seven percent of corporations with ADMs less than 1,000, had 51-60 percent of AP tests taken score a 3 or greater. Of corporations with ADMs greater than 1,000, 21 had 51-60 percent of AP tests taken score a 3 or greater. However, because of the larger number of corporations with ADMs over 1,000, this equates to only nine percent of corporations with ADMs greater than 1,000 having 51-60 percent of AP tests taken score a 3 or greater. This result is similar to that of corporations with an ADM less than 1,000.

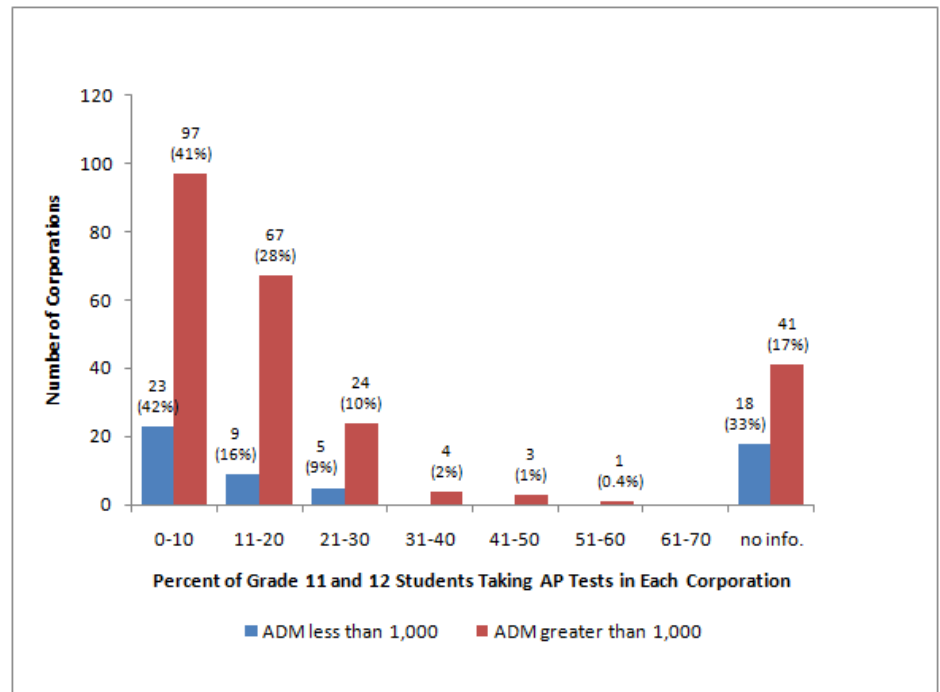
The data on AP test scores indicate that there is wide variability in levels of AP participation and performance from school corporation to school corporation, regardless of ADM size. The number of AP tests taken alone is not a comparable indicator of student achievement across corporations. Rather, assessing performance on AP tests in combination with the available curriculum offerings is a better indicator of achievement and opportunity.

### Opportunities for Achievement as Measured by ISTEP+ Scores

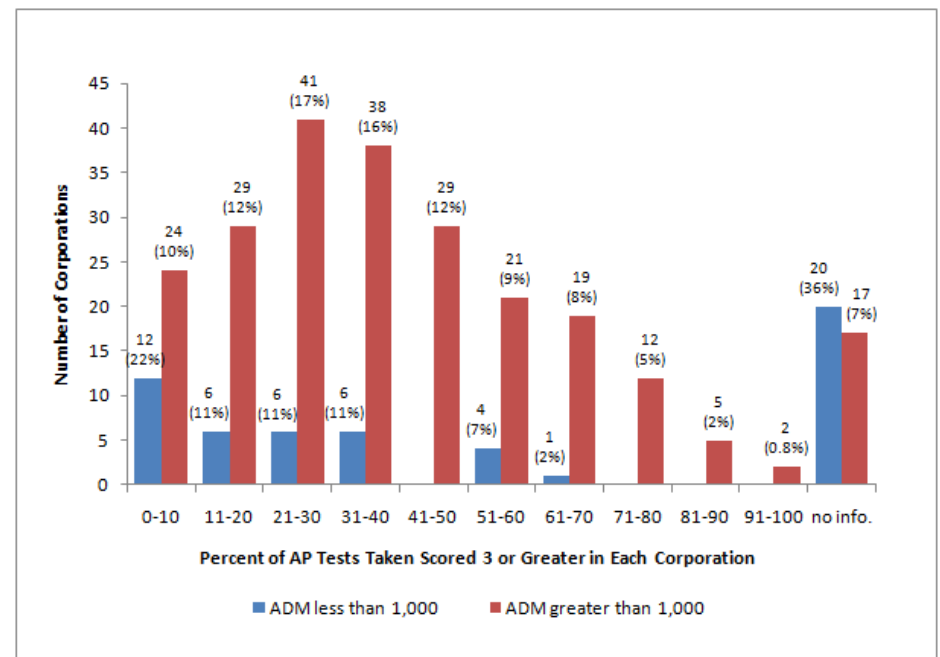
The Indiana Statewide Testing for Educational Progress-Plus (ISTEP+) is used to assess Grades 3-8 students' mastery of basic English/language arts and mathematics skills (ISTEP+ science and social studies scores are not included in this analysis). All school corporations in the state participate in ISTEP+, making it a valid comparison tool for academic achievement across corporations.

Figure 4 illustrates the percentage of students in all grades (Grades 3-10 at the time) passing both the English/language arts and mathematics components of the fall 2008-09 ISTEP+. For example, 10 school corporations with ADMs less than 1,000 had

**Figure 2. Percent of Students Taking AP by Corporation Size**



**Figure 3. Percent AP Tests Scored 3 or Greater by Corporation Size**



Source: IDOE, Compare School Corporations, <http://mustang.doe.state.in.us/SAS/sas1.cfm>

between 51 and 60 percent of students pass both the English and math components of the ISTEP+. On average, corporations with ADMs between 1,000 and 10,000 had slightly higher percentages of students passing both the English and math components of the test than corporations of smaller or larger sizes. The highest performing ADM

category on average was between 5,000 and 10,000, a finding which also holds true when English/language arts and mathematics scores are considered separately.

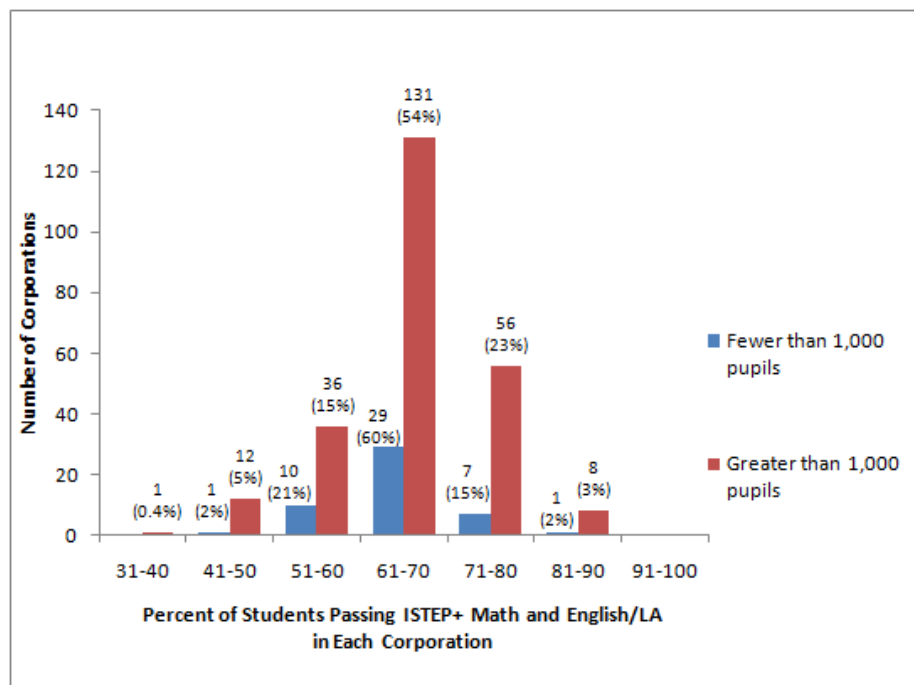
A statistical analysis of the differences between average percentages of students passing both math and English/language

arts across five years in school corporations of the six sizes calculated by the IDOE and displayed in Table 4 was not significant ( $p=0.05$ ). This analysis was based on a chi-square test which utilized the size categories indicated and classified percentages in five-percent ranges (35%, 40%, etc.). Due to the large range of percentages passing the ISTEP+, this method resulted in a high number of categories, which increases the likelihood of failing to find a significant difference between groups. The variability in number of corporations in each classification also raises suspicions about comparing groups to one another.

Although this sophisticated statistical analysis demonstrates that comparison between corporation sizes is not valid, a less statistical overview of the data reveals trends which may be useful nonetheless. For example, Table 4 illustrates the five-year average of percent passing both English/language arts and mathematics by corporation size. The average percent passing is higher for each corporation category in 2008-09 than the five-year average. The five-year averages follow the same trends as those from 2008-09. Specifically, the five-year average of percent passing for corporations with ADMs of 5,000-10,000 was slightly higher than for larger or smaller corporation categories. Corporations with ADMs greater than 20,000 had the lowest five-year percent passing average.

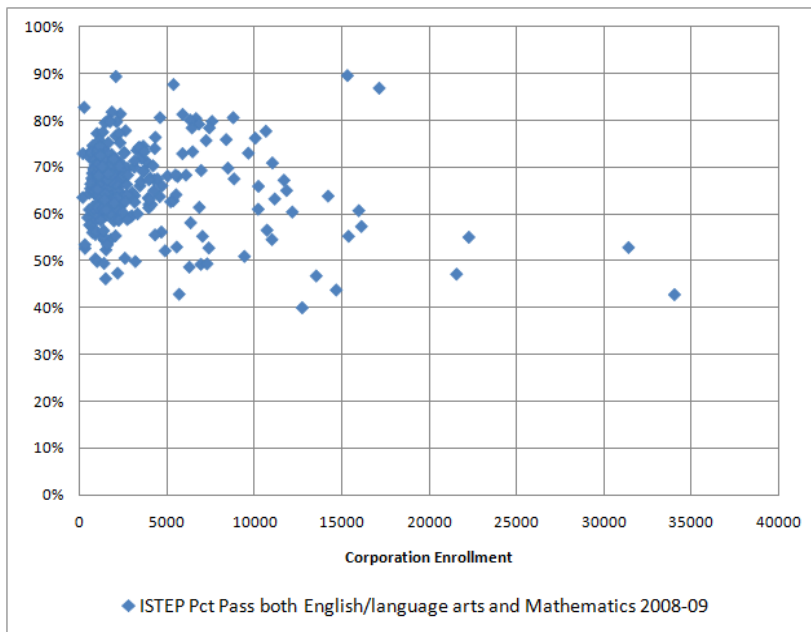
Although not controlling for any other factors such as student socioeconomic status, demographic characteristics, English language learners, etc., corporations with ADMs between 5,000 and 10,000 had the highest percentages of students passing both the English/language arts and mathematics components, as well as each of the components individually. Within this finding, it is important to note that corporations of all sizes demonstrate considerable variability in scores. Figure 5, a scatter plot of percent passing both the English/language

**Figure 4. Percent Passing Both Math and English/LA by Corporation Size**



Source: IDOE, Compare School Corporations, <http://mustang.doe.state.in.us/SAS/sas1.cfm>

**Figure 5. Fall 2008-09 ISTEP+ Pct Pass Both English/Language Arts and Mathematics (All Grades)**



**TABLE 4. Fall ISTEP+ Percent Passing Both English/Language Arts and Math All Grades and School Corporation Size Five-Year Average**

	Corporations less than 500	Corporations 500-1,000	Corporations 1,000-5,000	Corporations 5,000-10,000	Corporations 10,000-20,000	Corporations greater than 20,000
ISTEP+ Percent Passing both English and Math Five-Year Average (2004-05 to 2008-09)	61.73%	63.80%	65.97%	66.08%	62.64%	48.63%

Source: IDOE, Compare School Corporations, <http://mustang.doe.state.in.us/SAS/sas1.cfm>

arts and mathematics components of ISTEP+ and corporation size, visually illustrates the lack of consistency between corporation size and ISTEP+ passing percentages.

More importantly, in 2008-09 the average percent passing of the corporations with ADMs less than 500, 500 to 1,000, 1,000 to 5,000, 5,000 to 10,000, and 10,000 to 20,000 were all within four percentage points of one another when looking at English/language arts and mathematics individually as well as percent passing both. The outlying ADM category was corporations with ADMs greater than 20,000, which was consistently the lowest performing category and tended to deviate from the highest category by at least 10 percentage points. One reason for this variation may be the small number of corporations in this category. Overall, the data indicate that while corporations between 1,000 and 10,000 tend to have higher on average percent passing rates, without controlling for other influential factors corporation size alone cannot be considered an accurate predictor of student academic success.

### Student Instructional Expenditures

Of the 30 school corporations with a ratio of student instructional expenditures to all expenses of less than 50 percent, only two schools, Eminence Community School Corporation (537 students) and Wes-Del Community Schools (807), had an ADM of less than 1,000 students (see Table 5).

Of the 20 school corporations with a ratio of student instructional expenditures to all expenses of 68 percent or greater, five had an ADM of less than 1,000 students. Three of these corporations had an ADM of less than 500 students. Furthermore, the two corporations with the highest ratios all had fewer than 1,000 students, and those with the five highest ratios all had fewer than 5,000 students (see Table 6).

These data indicate that operational efficiency is not governed by school corporation size alone. There is high variability in the ratio of student instructional expenses across all ADM levels. However, the data do suggest that small school corporations are at least as efficient as large districts by this standard.

**TABLE 5. Indiana School Corporations with the Lowest Ratios of Student Instructional Expenditures 2008-09**

Corporation Name	ADM	Ratio - Student Inst. To All Expenses
South Madison Com Sch Corp	4,182	37.0%
East Porter County Sch Corp	2,320	38.5%
Fremont Comm Schs	1,172	41.0%
Marion Comm Schs	4,878	41.4%
Carroll Consolidated Sch Corp	1,119	43.8%
Frankton-Lapel Comm Schs	2,541	44.4%
Eminence Community Sch Corp	537	44.7%
Clark-Pleasant Com Sch Corp	5,598	44.9%
M S D Warren Township	12,165	45.0%
Paoli Community Sch Corp	1,613	45.9%
Penn-Harris-Madison Sch Corp	10,650	46.4%
M S D Perry Township	14,213	46.5%
Avon Community Sch Corp	8,380	46.9%
Merrillville Community Sch	7,021	47.3%
Westfield-Washington Schs	5,887	47.5%
Plainfield Community Sch Corp	4,589	47.7%
Valparaiso Community Schs	6,416	47.8%
Porter Township Sch Corp	1,642	48.1%
Shelby Eastern Schs	1,508	48.1%
Hanover Community Sch Corp	1,975	48.3%
Zionsville Community Schs	5,360	48.6%
South Montgomery Com Sch Corp	1,935	48.7%
Wes-Del Community Schs	807	48.8%
West Clark Community Schs	3,987	48.8%
New Prairie United Sch Corp	2,747	48.9%
North West Hendricks Schs	1,833	49.0%
Michigan City Area Schs	6,927	49.1%
Middlebury Community Schs	4,276	49.4%
Franklin Community Sch Corp	5,019	49.9%
School Town of Munster	4,322	49.9%

Source: Office of Management and Budget, Student Instructional Expenditure Report. July 7, 2010.

Note: ADMs are based on 2008-09 IDOE data

### Distribution of Indiana Students by School Corporation Public Enrollment Level

Table 7 illustrates the distribution of corporations and students by corporation size category in the state of Indiana. Looking at the aggregate enrollment levels by corporation size illustrates the relatively small proportion of students — 1,611 or 0.16 percent of the state’s over 1 million students — served by corporations with public enrollments less than 500. Corporations with enrollments between 500 and 1,000 serve 34,029 or 3.31 percent of the state’s

pupils. Corporations with enrollments between 1,000 and 5,000 serve the largest proportion — 39.35 — percent, of students in the state. Consolidation policies and/or reform efforts targeted at corporations with enrollments less than 1,000 students will impact only 3.47 percent of the state’s students. In contrast, deconsolidation policies directed at corporations with enrollments greater than 10,000 will affect 35.48 percent of pupils in the state.

**TABLE 6. Indiana School Corporations with the Highest Ratios of Student Instructional Expenditures 2008-09**

Corporation Name	ADM	Ratio - Student Inst. To All Expenses
West Central Sch Corp	894	73.8%
Dewey Township Schs	168	73.2%
Loogootee Community Sch Corp	1,047	71.1%
Logansport Community Sch Corp	4,303	70.8%
Mississinewa Comm Sch Corp	2,275	70.7%
Milan Community Schs	1,289	70.4%
Fort Wayne Community Schs	31,419	70.3%
Cannelton City Schs	294	70.1%
New Castle Community Sch Corp	3,952	70.1%
Greater Clark County Schs	10,997	70.0%
Sch City of Mishawaka	5,509	69.9%
M S D Wabash County Schs	2,492	69.9%
Perry Central Com Schs Corp	1,163	69.5%
Fayette County Sch Corp	4,239	69.4%
Richmond Community Schs	5,542	69.2%
M S D Shakamak Schs	885	68.3%
Lafayette Sch Corp	7,382	68.3%
Goshen Community Schs	6,268	68.2%
Cass Township Schs	247	68.0%

Source: Office of Management and Budget, Student Instructional Expenditure Report. July 7, 2010.

Note: ADMs are based on 2008-09 IDOE data

### Indiana Senate Bill 502

As part of a broader initiative, Chapter 17 of Senate Bill 502, which was also proposed in 2009, addressed school corporation consolidation within the context of government reorganization. The bill proposed that school corporations with an ADM of less than 2,000 as of July 1, 2008, would be required to reorganize before July 1, 2012. School corporations with

2,000 or more students would have the option to reorganize. A governing body of the affected school corporation would be required to hold public hearings to discuss methods of reorganization available to the school corporation and to solicit feedback from community members including teachers, administrators, business leaders, and other school employees.

The bill highlighted the following as important factors to consider when determining reorganization strategies: student achievement, geographic considerations, popula-

tion distribution, transportation issues, and costs. The governing body would then determine the most appropriate course of action for reorganization and carry out the necessary steps. If the governing body did not develop a reorganization plan to be implemented before July 1, 2013, the SBOE would develop a reorganization plan for the school corporation. Should the governing body of a school corporation with less than 2,000 students determine that it was not in the best interest of the students for the corporation to reorganize, the governing body could petition the SBOE for a waiver from these requirements.

The Senate Education and Career Development Committee held a hearing on SB521 on February 18, 2009, but no vote was taken. Meanwhile, SB502 was introduced in the Senate Local Government Committee, but a hearing and vote on the bill did not occur. It is possible that these proposals or very similar legislation may be reintroduced in a future legislative session.

### House Enrolled Act (HEA) 1001-2009

Although the two bills related to school corporation consolidation criteria at the statewide level never made it out of committee, legislation that requires the consolidation of one school corporation recently passed. House Enrolled Act (HEA) 1001-2009, passed by the IGA on June 30, 2009, mandates that prior to January 1, 2011, Prairie Township School Corporation, which served 36 students in 2008-09, must reorganize by consolidating with an adjacent school corporation. If the school corporation does not comply by the 2011 deadline, the SBOE will design a reorganization plan for the school corporation and require that it implement this plan.

**TABLE 7. Distribution of School Corporations by Public Enrollment 2008-2009**

	Corporations less than 500	Corporations 500-1,000	Corporations 1,000-5,000	Corporations 5,000-10,000	Corporations 10,000-20,000	Corporations greater than 20,000
Number of Corporations	6	42	187	33	20	4
Aggregate Enrollment	1,611	34,029	404,846	223,292	255,794	109,313
Average Enrollment Per Corporation	269	810	2,165	6,766	12,790	27,328
Percentage of Students Enrolled in the State	0.16%	3.31%	39.35%	21.70%	24.86%	10.62%

Note: Corporation size classifications are based on IDOE number of pupils data and not ADM.

Source: IDOE, Compare School Corporations, <http://mustang.doe.state.in.us/SEARCH/CORP/criteria.cfm?>

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## CONCLUSIONS AND RECOMMENDATIONS

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### Conclusion

Consolidation is likely to remain a perennial issue of state legislatures and school administrators as long as reducing costs while maximizing academic achievement remains a priority. The strategy taken by Maine of mandating consolidation through statewide legislation represents one approach states may utilize to promote economic efficiency.

### Recommendation

Additional research needs to be conducted to determine the extent to which the required consolidation generates cost savings for school districts and results in increased student achievement in states that have pursued consolidation, like Maine. Furthermore, how generalizable Maine's experience with consolidation is to other states needs to be examined.

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### Conclusion

Although it has been five decades since the state legislature in Indiana has required a round of statewide school or school corporation consolidation, the state has offered an incentive for districts to examine the potential benefits by providing funding for school corporations to conduct consolidation feasibility studies. These consolidation feasibility studies revealed that there are a number of areas where increased collaboration may be beneficial.

### Recommendation

A non-exhaustive list of areas where increased opportunities for collaboration should be explored includes: sharing services (such as curriculum development or financial management), negotiating joint purchasing agreements (such as school busses and health insurance) to take advantage of economies of scale, exploring collaborative distance or virtual learning possibilities, collaborating on grant proposals, and offering joint professional development opportunities. The impact these collaborative efforts have on student achievement as well as the extent cost savings are generated should be documented.

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## Conclusion

The analysis of school reorganization as proposed by Indiana State Senate Bill 521, proposed in the 2009 legislative session, indicated that school district size alone does not determine academic achievement or economic efficiency. The data on AP test scores indicate that there is wide variability in levels of AP participation and performance from school corporation to school corporation, regardless of ADM size. Although there is slight evidence, as measured by the percentage of students taking AP tests suggesting that larger school corporations are able to provide enhanced curricular opportunities at the high school level, ISTEP+ data analysis indicates no statistically significant scores when grouping school corporations by size, except for districts with more than 20,000 students (which have the lowest scores).

When examining the instructional expenditures data, which depict high variability in the ratio of student instructional expenses across all ADM levels, it is apparent that operational efficiency is not governed solely by school corporation size. However, examining the ratios of student instructional expenditures to other expenses indicates that smaller school corporations may be at least as efficient at getting dollars into the classroom. Furthermore, the smaller school corporations are highly successful in demonstrating Adequate Yearly Progress.

Overall, when judging the merits of school corporation consolidation in Indiana by these measures, a compelling case does not exist for mandated school corporation consolidation. Perhaps a stronger case exists for deconsolidation of the state's largest districts. More evidence suggests that further savings and efficiencies can likely be realized through shared services and joint purchasing by school districts.

### Recommendations

- The Indiana Department of Education, as well as individual school corporations, should continue to explore virtual learning opportunities to expand advanced-level course offerings in smaller school corporations.

- Options of open enrollment, half-day or flexible scheduling, online instruction, and joint summer school programs between schools could also increase curriculum offerings without consolidation.
- Tracking expenditure data by line item at the school level will increase the ability of researchers to understand how operational efficiency can be improved and how school expenditure data are linked to student achievement.
- A balance between costs, achievement, and social and political considerations must be maintained by policymakers and education leaders to maximize the utility of public education for its citizenry.
- Any future discussion of consolidation should also include consideration of deconsolidation.
- If consolidation is pursued it should be considered on a case-by-case basis only, not mandated on a wholesale basis. If implemented to any extent, the implications of consolidation on state and federal accountability category placements must be considered.

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## CITATIONS FOR FEASIBILITY STUDIES (ON PAGES 6-9)

The enrollment and demographic information for each school district as well as the Indiana state map highlighting each corporation's county location were obtained from the Indiana Department of Education School Data Snapshot Database available at <http://www.doe.in.gov/data/>

The feasibility study reports for each of the eight studies conducted between 2007 and 2009 were obtained through personal communication with the superintendents of the participating school corporations and/or the authors of the individual reports. The titles and available citation information for each study report are provided below.

## 2007-08 Studies

Randolph Central, Randolph Eastern, Randolph Southern, and Union School Corporations

"Randolph County Study." By Administrator Assistance. Dr. Tom McKaig, Dr. Steve Healy, Dr. Mike O'Connor and Steve Wittenauer.

Monroe Central Community Schools and Union School Corporation

"Monroe Central Community Schools and Union School Corporation Study."

Cowan Community Schools and Daleville Community Schools

"Cowan-Daleville Study." By Administrator Assistance. Sheri Brower, Ph.D. and Marlin B. Creasy, Ph.D.

White County (Frontier, North White, Tri County, and Twin Lakes)

White County Consolidation Study: Final Report to the White County Consolidation Steering Committee. August 26, 2008. Purdue's Educational Leadership Initiative for Small and Rural Schools (PELISARS).

## 2008-09 Studies

Rockville, Turkey Run, and SW Parke Co Schools

"Rockville Community School Corporation, Southwest Parke Community School Corporation, and Turkey Run Community School Corporation Unification Study." By Administrator Assistance. May 20, 2009. Dr. Steve Healy, Dr. John McKinney, Tony Rose, and Dr. Tom McKraig.

Clinton Central and Clinton Prairie

"Study of Consolidated and Shared Services: Clinton Central and Clinton Prairie School Corporations." By Educational Services Company. July 27, 2009.

Rochester, Caston, and Tippecanoe Valley

"Fulton County Study." By Administrator Assistance. May 16, 2009. Sheri Brower, Ph.D., Marlin B. Creasy, Ph.D., and R. Michael O'Connor, Ph.D.

North Judson-San Pierre and Oregon-Davis

"A Comprehensive Study of the Advantages of a Merged or Shared Services Agreement Between the Oregon-Davis and North Judson-San Pierre School Corporations." Prepared for Boards of School Trustees, Dr. Steve Disney, Superintendent, and Mr. Iran Floyd, Superintendent.

Prepared by Dr. Robert Boyd and Dr. Greg Ulm, Indiana State University. May 2009.

For additional information on the efforts of school corporations in Indiana to merge services and increase financial efficiencies through joint purchasing, please see the following CEEP reports:

*Summary of State Surveys on Consolidated Purchasing and Shared Service Arrangements among School Corporations, Charter Schools, and Education Service Centers*  
Focus on Indiana, Volume 4, Number 1, Winter 2010  
[http://www.ceep.indiana.edu/projects/PDF/FOI\\_V4N1\\_2010.pdf](http://www.ceep.indiana.edu/projects/PDF/FOI_V4N1_2010.pdf)

*An Analysis of Purchasing and Cooperative Agreements Among School Corporations, Charter Schools, and Education Service Centers*  
Special Report, December 2007  
[http://ceep.indiana.edu/projects/PDF/Special\\_Purchasing\\_Agreements.pdf](http://ceep.indiana.edu/projects/PDF/Special_Purchasing_Agreements.pdf)

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## WEB RESOURCES

### Indiana State Senate Bill 521

<http://www.in.gov/legislative/bills/2009/IN/IN0521.1.html>

### Indiana Office of Management & Budget Student Instructional Expenditures (2008-2009)

<http://www.in.gov/omb/2567.htm>

### School Limits: Probing the Boundaries of Public Education

[http://www.regional-institute.buffalo.edu/Includes/UserDownloads/PolicyBrief\\_SchoolDistricts\\_June09\\_FINAL.pdf](http://www.regional-institute.buffalo.edu/Includes/UserDownloads/PolicyBrief_SchoolDistricts_June09_FINAL.pdf)

### School Inflation: Did the 20th-century Growth in School Size Improve Education

<http://educationnext.org/school-inflation/>

### School District Consolidation, Size and Spending: an Evaluation

<http://www.mackinac.org/article.aspx?ID=8530>

### Maine Department of Education Summary of Reorganization Law

<http://www.maine.gov/education/reorg/lawsummary.html>

### Maine Department of Education School Administrative Reorganization

[http://www.maine.gov/education/reorg/reorg\\_narrative.pdf](http://www.maine.gov/education/reorg/reorg_narrative.pdf)

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