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ENROLLMENT DECLINE: THE USES AND DISPOSITION OF EXCESS SPACE
IN 106 OREGON PUBLIC SCHOOL DISTRICTS

by
MARJORIE BROTHERS

A dissertation submitted in partial fulfillment of the
requirements for the degree of

DOCTOR OF EDUCATION
in
PUBLIC SCHOOL ADMINISTRATION AND SUPERVISION

Portland State University
The University of Oregon

1983

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AN ABSTRACT OF THE DISSERTATION OF Marjorie Brothers for the Doctor of Education in Public School Administration and Supervision presented November 15, 1983.

Title: Enrollment Decline: The Uses and Disposition of Excess Space in 106 Oregon Public School Districts

APPROVED BY MEMBERS OF THE DISSERTATION COMMITTEE:

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This study surveyed the status of the public school districts in Oregon with regard to growth or decline in enrollment and the uses and disposition of excess space resulting from a decline. A questionnaire was mailed to superintendents in each of the 126 districts which had

declined in enrollment during the years between 1970 and 1983. Of these, 106 districts returned the questionnaire, a return rate of 84.12%. From these, a third sample consisting of the 23 districts which had closed schools was selected. The 33 last closed schools were examined in detail.

It was found that 53.7% of the districts which returned the questionnaire had experienced a decline in enrollment of sufficient magnitude to necessitate some adjustment in the ways in which building space is utilized in the district. Of these, 54% were using space to house programs mandated by federal, state, or local governments. Space was also being used for such purposes as; classrooms, curriculum centers, office space, and community programs. Forty-two percent reported that the district had unused space in addition to that used for storage or for other purposes.

Districts used varied means to involve or inform the community in decisions concerning the uses or disposition of excess space. The school board makes the final decision concerning the uses of space or the closure of a building, yet each district reported some involvement of others in the process. The largest percentage (49% of those with a decline in enrollment and 85% of those which had closed schools) reported using administrative decision as part of the process. A task force was used in 7.5% of districts with a decline in enrollment and in 30.4% of those which had closed schools.

To explore the issues which might be factors in the conflict surrounding the closure of a school, the 33 last closed schools were divided into two categories: those which had experienced major conflict,

and those which had experienced little conflict over the closure. Pearson correlations were computed to determine the relationship between the level of opposition to the closure and factors which might contribute to the conflict. A significant correlation was found between the level of opposition and several of the variables examined. An inverse relationship ($p = .03$) was found between the level of conflict and the presence of a task force involved in decisions concerning the uses and disposition of space. An inverse relationship was also found between the level of opposition and the average length of time that the school board members had served ($p = .04$); that is, the shorter the average time of service, the greater the likelihood of conflict surrounding school closures.

Opposition to the closure of a school had no significant correlation ($p = .75$) to the financial result of the closure. Of the 33 schools examined in the study, superintendents reported that in 29 cases the closure had saved the district money; the remaining four schools had been closed so recently that the financial result could not be assessed as yet.

The problem of unneeded building space is expected to continue as shifts in population continue. The need for an analysis of methods used for the reduction of conflict in the closing of a school is apparent. There is also need for careful planning for efficient use of excess space, including the disposition of excess space.

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CHAPTER I

INTRODUCTION TO THE STUDY

Introduction

The problem of what to do with a school building no longer needed by a school district is not a new one. Buildings designed for one educational purpose do not always fit a newer or a different one. Changes in educational philosophies and new or modified federal, state, or local statutes have required new or different educational programs. These changes have necessitated some modification of building space. At times these innovations could be accommodated in existing building space with little or no modification of the building itself. At other times, the existing buildings have proved to be obsolete. In some cases the building had simply worn out and repair would cost more than the building was worth, so a new building was constructed, one more suitable for the educational program. In cases like these, the use or disposal of the old property can present a problem for the district, particularly when the property is encumbered by a restrictive deed or when the property has such high sentimental value for residents of the adjoining community that closing the school causes opposition. Problems such as these have been in existence for some time in older school districts.

In recent years, however, the problem of what to do with building space that is no longer needed for classrooms has become more acute as

the result of several factors. A sharp decline in the birthrate in recent years has produced a decline in the number of students enrolled in public schools. This decline may ease somewhat in the coming years, but, at the present time, the decline in birthrate continues to be a factor contributing to the excess space existing in some public schools today.

Another factor contributing to the problem of excess space is that of population mobility. Within districts there may be a movement of population which creates surplus space in one area and an insufficiency of space in another. Other population shifts involve the movement of young, middle-class parents into the suburbs and beyond. There has also been a national movement from the north and northeastern parts of the United States into the western and southwestern parts, the areas known as the sunbelt.

The growth of private and parochial schools is another factor contributing to the decline in public school enrollment. Thus, the problem of what to do with unneeded classroom space is expected to continue. This study focuses on the problems associated with enrollment decline in the public schools of Oregon.

The Problem

This study was organized to present a descriptive study of the public school districts of Oregon with regard to declining enrollment. Although there have been studies made of individual schools in the northwest, this writer has been unable to find any study which answers the question of how many school districts in Oregon have enrollments

which have declined enough to necessitate an adjustment in the ways in which school space is used. The extent to which citizens' committees are involved in decisions concerning the uses or disposition of school space is only vaguely known. The question of how many public school districts in Oregon have developed a policy for consideration of building closures has not been addressed. How these districts are using or disposing of surplus space is not known. Lastly, although factors which might lessen community conflict during a school closure have been suggested by writers, studies comparing these factors in schools where conflict has been present have not been conducted. It was to address these questions that this study was undertaken.

Specifically, this study was designed to test the following questions:

1. Which Oregon public school districts have experienced a decline in enrollment severe enough to necessitate an adjustment in the use of building space?
2. How is excess building space resulting from declining enrollment being used or disposed of in Oregon?
3. Has the community been involved in decisions concerning the uses or disposition of school space?
4. Have Oregon public school districts devised written policies or guidelines for the uses or disposition of excess space?
5. What problems in building space do Oregon superintendents foresee in the next three years?
6. To what extent has conflict been experienced by districts over the decision to close a school building?

7. What methods have been used to avoid or minimize conflict?
8. Are there similarities among districts which have experienced severe conflict over a decision to close a school?
9. Has the closure of a school resulted in a monetary saving for the district?

A second purpose of the study was to compare school districts which have closed schools with a minimum of conflict with districts which have closed schools but have experienced major conflict while doing so. The purpose of this comparison was to discern whether it were possible with the data collected and the procedures used to identify characteristics which distinguish a district which had conflict from one which did not. These findings might conceivably enable one to predict which districts would be likely to experience conflict should they attempt to close a school. The study might also identify procedures which could lessen the conflict.

The Importance of the Study

Although some demographers foresee the end of declining enrollment on a national level with a possible upturn in enrollment beginning in the 1980's and continuing past the turn of the century, the problems associated with excess space are expected to continue as the wave of low enrollment passes through the schools, as migration to the sunbelt intensifies, as movement to the suburbs and beyond continues, and as young families move to areas where the development of new energy sources makes jobs available to them. At the present time, demographers expect to see a lower number of students passing through the grades, followed

by a larger number of students moving into the schools. This is likely to cause a surplus of space at upper grade levels, followed by insufficient space at lower grade levels. Thus the problems associated with declining enrollments and the uses or disposition of excess space are expected to continue.

An ERIC search into the topic of declining enrollment and the related topic of school closures revealed some material available on a national level but very little material concerning schools in the northwest, and even less related to the public schools of Oregon. The need for an assessment of the current status of Oregon districts is apparent. Without such an assessment, planning for future building needs will be difficult. The need for an analysis of methods used for the reduction of conflict in the closing of a school is also unmistakable.

Delimitations

This study describes the characteristics of public school districts in Oregon with regard to decline in enrollment. It describes how those districts which have declined in enrollment are utilizing or disposing of any excess space resulting from this decline. It describes the ways in which the community has been involved in or informed of decisions concerning the uses or disposition of excess space. It examines factors surrounding conflict over the closing of a school and the forms this opposition may take.

There has been no attempt to survey districts which have reorganized or reallocated resources because of a levy failure or budgetary defeat, although these problems may be incidental issues related to measures taken as a result of declining enrollment.

In selecting school districts for study, a comparison was made of attendance figures from reports obtained from the Oregon State Department of Education (Note 1). When district reorganization made such a comparison invalid, a questionnaire was mailed to the district to determine whether enrollment had declined in the district. It is possible that a district which had been reorganized without a change in the name of the district may have been missed in the survey. An attempt was made to ascertain whether district reorganization had taken place and to include those which had been reorganized in the survey.

Only the years between 1970 and 1983 were considered in the study. Data for the closing of schools were limited to those which had been closed since 1977. In the case of individual school closures, only the last school closed or targeted for closure was considered for study. When several schools were closed at the same time, each school was considered separately.

The population selected for study was based on 1982 attendance figures and may not fully reflect the true extent of enrollment decline in Oregon resulting from the recent economic downturn in timber-related industries.

Definition of Terms

An effort was made throughout this document to use terms which are well known so that further definition could be kept to a minimum. There are, however, some terms which need clarification. Those which are not presented in this section are defined when they are used.

This writer understands that, for many school districts, excess space is a welcome relief from the overcrowded classrooms which resulted from the "baby boom" of the 1950's. For others, the reduction in state aid which has resulted from the decrease in enrollment has created budgetary problems. For the purpose of this study, the term "problem" is used to mean: "A question posed for solution or consideration". (Guralnik, 1978, p. 1132)

When an entire building which had previously been used for instructional purposes was no longer needed, that building, for the purposes of this study, was considered closed. When only a part of a building was no longer needed by a district, that part of the building no longer needed was deemed "excess space" even though an entire wing of a building might be closed.

In this study, a closed school is one that was designated as such by the district. The school was formerly used, at least in part, for classrooms. When closed, it may have been used for educational purposes but was not used on a continuing basis for classrooms.

There are many ways to assess the size of a districts' student population. For the purpose of this study the terms average daily membership attending (ADMa) and average daily membership resident (ADM_r) are used. The average daily membership attending (ADMa) figure denotes the average number of students sitting in the classrooms of the district on a given day. Average daily membership resident (ADM_r) figures denote the average number of students in the classrooms who are residents of the district. For some districts this resident figure (ADM_r) will be less than the attending figure (ADMa), because it does

not include tuition students. Average daily membership figures are calculated on a monthly basis by each school district and sent to the Oregon State Department of Education, which supplied the data used in this study (Spaniol, Note 2).

Organization of the Study

It is the purpose of this section of the chapter to present a brief overview of the scope of this study. This chapter has provided a rationale for the study, described the problem investigated, identified possible limitations to the study, and defined relevant terms. The next chapter, Chapter II, provides a review of the literature related to the following topics:

1. declining enrollments in the public schools of the United States;
2. methods of enrollment projections currently in use in the United States;
3. suggestions and examples of the uses which districts have made of excess space resulting from declining enrollments;
4. problems and possible methods of lessening conflict related to the closure of a school; and
5. legal ramifications of using school space for other than educational purposes.

Chapter III provides a description of the research design and methodology. It describes the population studied, method of data collection, field testing of the questionnaire used in the collection of data, and tabulation of data received. There is also an explanation

of the statistical treatment utilized in the study, together with the tests and computer programs used in the study.

Chapter IV reports and discusses the findings of the study with tables showing the data received. There is a brief description of the policies which Oregon districts have developed for coping with the problems associated with decline. The chapter also includes a summary of the significant correlations among variables in districts which have closed a school.

Chapter V provides a summary of the study, together with a discussion of some of the conclusions and implications of the findings. There are recommendations and suggestions for areas which may merit further study.

CHAPTER II

REVIEW OF LITERATURE

Introduction

This chapter summarizes the literature available on the subject of declining enrollment in the public schools and the uses which public school districts have made of any excess space resulting from the decline. It includes examples of policies and guidelines which districts have adopted to meet the problems of decline and examples of some of the uses of excess space. There is a discussion of some of the methods which districts have used to minimize conflict when a building must be closed.

Declining Enrollments

Berman and McLaughlin (1978) stated that a sharp drop in the birthrate, the flight of young, middle-class people to suburbia's outer areas and beyond, and localized migration within and between districts have produced a marked national trend toward decline in public school enrollment.

The migration of young families from inner city areas to the suburbs has made the problem of declining enrollment more acute for inner city systems. The problem of declining enrollment and empty classrooms is not, however, limited to the inner city. Many suburban districts also face this problem. A comparison of Lake Oswego

enrollment figures for elementary students from the fall of 1970 to the fall of 1982 (Valo, 1981; "Lake Oswego", 1982) revealed that there has been a decline in the number of students during this time period. In September, 1982, the elementary enrollment was 2,587, down from the 1970 figure of 3,452. District-wide the student population had dropped by 96 students between October, 1981, and September, 1982, even though there had been a slight increase in the number of students at the secondary level.

The Beaverton District has also experienced a decline in student population. Ward (1982) reported that the Beaverton school board had voted to close one elementary school in the fall of 1983. Since 1980 a citizens' study committee in that district has been looking at projections of declining enrollment and cost effectiveness at five elementary schools in the district. In a January 20 report to the superintendent, the committee recommended the closure of one school. Superintendent Applegarth subsequently made this recommendation to the school board. Geiger, one of two board members opposing the vote, said that he did so because of the possible necessity of closing two schools, instead of the one decided upon. He said that enrollment projections show only enough students to justify operation of three elementary schools instead of the five now in operation.

When the problems of enrollment decline first began to emerge, many saw the resulting excess space as the answer to the overcrowding which had occurred when the "baby boom" of the early fifties forced school districts to crowd increasing numbers of students into buildings which couldn't be expanded quickly enough to provide for them. Now,

with declining birthrates and tighter budgets, many school districts have had to close buildings.

Fleming (1981) found that such factors as court mandates for desegregation, urban flight, diminishing financial resources, soaring operational costs, and declining enrollments have complicated the issue of school closure. The concept of citizen involvement has, at times, made the closure of a school more difficult. Many consider the neighborhood school concept a fundamental right and see the closure of "their" school as the beginning of the decline of the neighborhood. In Corvallis, Oregon, a group of parents launched a petition drive aimed at establishing strict guidelines for school closures. If the initiative had been approved, voters would have had the final say on the closure of a school (Curtin, 1982). For these reasons, many school districts have sought alternatives to school closures.

Planning

Keough (1979) said that it is a grave error for administrators to attempt to deal with declining enrollment by applying a short-term solution instead of engaging in long-range planning. It is necessary, he said, to have a master plan which incorporates opportunities for community, faculty, and administrator input. Brody (1976) said that the keys to success are "changing citizens' attitudes toward enrollment decline, long-range planning, and community involvement" (p. 31). Frederickson (1978) stated that effective long-range planning by school districts is an imperative in dealing with declining enrollments. He said that school districts should: (1) evaluate present programs in

light of current statutory regulations and educational trends and innovations; (2) appraise the structural qualities of existing school facilities; (3) conduct preschool censuses and district-wide enrollment projections; (4) conduct community-wide surveys to determine the economic growth potential; (5) prepare for possible purchase, lease, or sale of school sites and buildings; (6) investigate modern architectural innovations; (7) develop educational specifications for future projects; and (8) develop an ongoing public dissemination program of school district activities and objectives. After taking these steps, excess space can be considered in terms of how it might be affected by recent federal legislation, whether it can be adapted or used to suit future educational activities, or whether it could be leased or sold to other agencies, either educational or noneducational.

Kloes (Note 3) stated that it is helpful to have at least the following available to staff members and others as they work on the problem of wise use of surplus facilities: (1) a policy, (2) staff committees, and (3) a citizens' committee. He also stressed the need to consider the nature of the district itself. The Renton, Washington, School District, of which Kloes is a deputy superintendent, went through a process of preparing a formal environmental impact statement as a part of its planning process.

Peruniak (1978) stated that it is regrettable that a comprehensive, coherent plan for dealing with the problems resulting from declining enrollment has not been developed in even one state. He attributed this lack to several factors, including the presence of many participants in the decision-making process, the proliferation of educational objectives,

the nonquantifiable character of educational accomplishments, and the increasingly unpredictable nature of the educational environment.

Eisenberger (1978) stressed three fundamental skills which are essential for board members in time of declining enrollment: long-range planning, decision-making, and the ability to marshal support for the implementation of the long-range plan. These skills will be discussed in the next part of this chapter.

Enrollment Projections

Planning for the educational needs of a school district is usually done on the basis of enrollment projections. District administrators predict the number of students who will be entering a school in a given year and then plan the space and services necessary to educate them. The Council of Educational Facility Planners (1976) listed these methods for predicting future enrollments: (1) the analysis of census data method, (2) the analogy approach, (3) the method of relating the school enrollment to the total population, (4) the average survival ratio technique, and (5) the saturation analysis method. Each of the methods listed by the council has limitations; for this reason, many districts use a combination of methods to make the prediction more accurate.

Using the analysis of census data method, an administrator would examine past census data to determine the rate of change or the average rate of change over a given period of time. The major criticism of the analysis of census data approach is that it ignores the possibility that one or more of the factors that produced change in the past may no longer be operative.

Using the analogy approach, an administrator would compare two similar school districts and base predictions for what would happen in one school district upon what happened in the other. Because it is difficult to find totally similar districts, this method is not very reliable unless it is used in combination with some other method.

The method of relating the school enrollment to the total population is more valuable for long-term projections than for short-term. It does not account for population shifts and is therefore not reliable enough for short-term projections.

The average survival ratio technique, sometimes called the cohort survival method, is the one most often used by school districts. The administrator compares birth data for a given year with public school enrollments in kindergarten or grade one some five or six years later and then compares numbers of students in each grade with those in the next higher grade one year later. Figures can be adjusted to take into account specific trends such as rapid growth in the community. In rapidly growing districts, the survival ratio technique can be used as a starting point for multiple factor analysis. In such districts, the effect of in-migration must be evaluated together with birth data and possible other factors which might affect enrollment.

Using the saturation method, school officials would seek to estimate the ultimate school enrollment which might result if all land areas in the district were completely developed. This type of study is especially valuable for long-range planning in urban areas where school sites must be acquired long in advance of actual building.

In projecting pupil populations, school officials usually bracket enrollments rather than give one estimate. The lower set of figures

projects one set of assumptions which may result in low enrollment; the higher set projects the maximum enrollment. The actual enrollment will probably fall somewhere in between the two figures.

Wegmann (1980) stated that the total number of children of school age is primarily a function of two factors: the number of women of child-bearing age and the number of children per woman of child-bearing age. The Educational Facilities Laboratories (1974) stated that the rate at which women (ages 15 to 44) have children, the fertility rate, is a more accurate index than is the crude birth rate, which is merely the number of births per 1,000 of the total population. However, since the fertility rate is an average rate for the years involved, it is not a precisely accurate measure either. The total number of births can be affected by the change in the fertility rate or by a change in the number of women (ages 15 to 44) or by a change in both of these factors. It is the combined effect of the changes in these two terms which results in changes in the number of births. If both the number and the rate increase, then births increase; if both decrease, births decrease. At the present time there is a rising number of women of child-bearing age but a decrease in the number of children per woman. This should result in a stabilization of population growth. Thus, the present drop in the number of births is very surprising.

By 1985 the United States will have the largest number of women of child-bearing age in its history. Although one is guessing when speculating about whether the fertility rate will continue to decline or will rise, there are some indications that it is beginning to rise. Robson, Owings, and Dembowski (1979), Wegmann (1980), and Abramowitz (1978)

foresaw a stabilization in enrollment patterns during the 1980's, followed by a 19% increase in the number of 5 to 13 year olds occurring in the years between 1980 and 2000. Secondary enrollments will continue to decline until 1990; a six percent rise in secondary enrollment is foreseen as occurring in the years between 1990 and 2000. Fishlow (1978) saw the possibility of a rapid growth in population after 1990.

Pitruzello (1980) stated that school districts must analyze data carefully if they hope to deal effectively with changing enrollment patterns. Districts may secure relevant data from such sources as local planning boards, utility companies, government records of vital statistics, carefully conducted school censuses, and municipal records of housing construction and property transfers.

Population Shift

There is another factor which influences pupil enrollment: a shift in population so that some districts face declining enrollments while others have growing numbers of students. Educational Facilities Laboratories (1974) stated that the growth or decline of an area was usually the result of one of these factors: a rapid decline in fertility, a reduction in migration from rural to urban areas, a declining desire to live in the central city, or an accentuation of uneven distribution of population through intermetropolitan migration.

Robson et al. (1979) reported a large movement from the central cities into the suburbs and rural areas. This movement has caused and is still causing population growth in some areas while others experience rapid decline. The Council of Educational Facility Planners (1978) stated that the average family moves once every five years.

Between 1970 and 1975, 60% of the people between the ages of 30 and 35 moved. Many of these have been parents of elementary school-age children. Before the 1970's, people moved to urban areas. During the current decade the movement, especially by middle-class Americans, has reversed and metropolitan areas have lost approximately seven million residents. (p. 11)

Wegmann (1980) also reported significant differences in what is happening in various parts of the country. The sunbelt, certain suburban areas and many rural areas are experiencing growth in their school-age population.

The Council of Educational Facility Planners (1978) also spoke of the migration to the sunbelt, the nation's warmer southern and western climates. "Since 1970, these areas have experienced 85% of the nation's growth, while the northeast and midwest have been losing population and industry" (p. 11).

Wegmann (1980) saw the problem of rapid growth as being particularly acute in certain areas of Colorado, Montana, North Dakota, and Wyoming, as these areas develop significant sources of coal, synthetic petroleum, or natural gas. Historically, those persons who move into "Boom Towns" have disproportionately been young adults with young children. This could contribute to the depopulation of some school districts and the need to expand others quickly.

Berman and McLaughlin (1978) agreed that the aggregate decline in enrollment does not affect all school districts in the same way. Out-migration may cause some districts to experience a severe enrollment drop while state averages remain the same. Moreover, within district migration may create problems of localized decline. The movement of young families to more affordable housing in outer suburbs may mean that

the pupil population has shifted to new neighborhoods, causing a need for new buildings in one area while a surplus exists in another.

Wegmann (1980) speculated about the effect of the energy crunch on the trend toward moving to the suburbs.

While it is possible that energy problems may cause some population movement back to the city, it is also possible that the movement of jobs out to the suburbs could be accelerated. In addition, should the government invest heavily in inexpensive rapid transit between city and suburb, this movement could be accelerated. (p. 7)

The Council of Educational Facility Planners (1976) suggested that, in predicting public school enrollments, school officials look at the non-public school enrollment, as well as at the holding power of the public schools. Benson (1978) studied attendance patterns in the central city. He reported that parents in some of the large heavily industrialized cities tend to send their children to private schools in greater numbers than did parents in the state as a whole. His tables show that cities consistently graduate fewer students than their enrollments indicate that they should. Students are either dropping out or are enrolling in private schools in far greater numbers than are their counterparts in suburban or rural areas.

Some Precautions

James O'Toole, quoted in Wegmann (1980), made this statement: "In the short period during which futurists have been practicing their craft, they have made one discovery of fundamental importance: The future cannot be predicted". (p. 1)

The Educational Facilities Laboratories Report (1976) stated that demographers, including those of the U.S. Census Bureau, have been so

burned by past predictions that they no longer predict, but instead project estimates based on past trends. The Council of Educational Facility Planners (1976) also spoke of the unreliability of student enrollment forecasts. Long-range projections made between 1930 and 1940 failed to foresee the enrollment increases which were to occur during the 1950's. Likewise, the declining birthrate resulting from the use of the pill and the appeal of zero population growth, which affected the schools beginning in the 1970's, was not predicted ten years earlier.

Some student enrollment projections have been remarkably accurate. The Portland, Oregon, enrollment projections made for the 1981-82 school year came within four of the number of students who actually showed up at the schools in September. Other school districts have not been so fortunate. The Lake Oswego District provides an example of a district where inaccurate enrollment projections led to the resignation of the superintendent. Valo (1981) reported that in 1978 voters in this district approved a bond issue for school construction based on projections of an imminent substantial increase in grade school enrollment. Then, only a year after two new elementary schools were opened, a study committee recommended the closure of one grade school unless tenants could be found to rent excess space. There were 369 fewer students enrolled in the school system than when the projections were made. Valo (1981) quoted former Lake Oswego assistant superintendent, Kent Meyers, as stating that he believed that conventional projections were violated and that "some seriously misleading figures were used to sell the public" on voting for a 1978 bond issue for Lake Oswego school construction. (p. MS1)

Despite these limitations, enrollment forecasts must be used by school officials in planning for the needs of the district. These forecasts must be carefully assessed. The nearer in time one is to the forecast, the more accurate the forecast is likely to be. Thus, the first year in a five-year forecast is likely to be the most accurate one; the fifth year is likely to be the farthest from the actual student count.

The Council of Educational Facility Planners (1976) stressed the importance of updating population enrollment projections annually so that changing conditions can be reflected and their effects anticipated.

Hentschke (1975) states that forecasting can be effectively used in combination with other techniques to reduce the elements of risk and uncertainty. In general, a forecast improved to the extent that the following steps were carried out: (1) obtain accurate and reliable data; (2) prepare the data correctly; (3) state the basic assumptions of the model; (4) use a consistent calculus or mechanical means; (5) apply more than one kind of forecasting; and (6) apply sound judgment.

The Economics of Decline

Many people think that declining enrollments should mean declining expenditures. Closing a school building should, therefore, be good economics. This has been found to be untrue. The Council of Educational Facility Planners (1978) reported that:

According to figures cited by the National School Public Relations Association, the nation's schools served 200,000 fewer students in 1975-76 than they did during the preceding year, and the cost was eleven billion dollars more. (p. 12)

Berman and McLaughlin (1978) found that enrollment declines can result in financial hardship for individual districts, because state aid is usually tied, at least in part, to average daily attendance. When revenue goes down, school districts must proportionately reduce their expenditures, but costs do not necessarily occur in administratively convenient units. For example, if the district loss of 60 third-grade students came from 30 schools, the district could not compensate for the reduced revenue by reducing its teaching force accordingly. Then too, fixed costs per student may rise even though per pupil expenditure remains constant. If a school district is forced to fire teachers, it is usually the low-salaried, less-experienced teachers who are let go; thus the average teacher cost per pupil is higher.

The Council of Educational Facility Planners (1978) cited inflation as a major problem contributing to the rise in the cost of education.

Costs of schooling are rising along with other costs. Salaries, facility maintenance, and teaching materials are more expensive. Fuel costs (when fuel is available) have escalated wildly. The necessity for making school buildings energy conservative, a process that may require modification of the building shell and mechanical systems as well as more intelligent operation, involves unavoidable capital investment. It costs more to fill school bus gasoline tanks and when neighborhood schools close because of enrollment decline, more students are bused farther. Teachers, with union backing, and administrators are demanding and getting higher wages. The list goes on and on. Inflation has introduced seemingly insurmountable complications. (p. 12)

A Toronto, Canada study ("Effect of Demographic Change," 1978) analyzed demographic data to trace the relationship between public school expenditure and enrollment. Its purpose was to predict the direction of educational expenditure in light of projected enrollment

trends. The report indicated that inflation, changes in educational policy, and increases in teacher salaries, rather than growth in enrollment, were the major contributory factors to increased costs of education. Thus, a further decline in school enrollment in the future may not necessarily bring a reduction in educational spending. This report predicted that, even discounting inflation, educational expenditures will continue to grow because of rising teacher's salaries, the continued need for capital spending, and a greater number of retired teachers receiving pensions. To this list, Benson (1978) added the costs of complying with federal mandates, especially when these mandates are no longer being accompanied by the federal funding necessary for their implementation.

Arbramowitz (1980) addressed questions of costs in terms of sacrificing school size, equity, and quality. She concluded that options exist for dealing with the problem of declining enrollment, but that each option has different costs and benefits associated with it. Each community has to decide what kind of education it wants to buy and how much it is willing to pay for it.

Collister (1977) reported a steady decline in enrollment in the Seattle, Washington, School District over the last decade. Despite this decline, even when total revenue and revenue dollars per child are expressed in 1967 dollars, it is clear that the number of dollars spent per child on education is increasing. This is true, partially because it is not possible to reduce staff members as fast as enrollment declines, and partially because special programs have increased.

Skiera (1979) quoted from a survey and from summary statements made by school officials. Their statements indicated that school clos-

ings did not, in every case, save the district money. Of the school superintendents who answered his questionnaire, 33% said that closing a school or schools had saved money for the district; 50% reported no change, and 6.7% said that the closure had cost the district money because of increased transportation costs, reduced school support, or increased crime.

Collins (Note 4) reported that the Portland School District saved \$599,190 during the six month period following the closure of two high schools and two elementary schools in June of 1981. He expected this saving to increase until the district saving amounted to \$1.2 million over a one year period. These savings results from a decreased need for custodial service, electricity, fuel oil, and staff. Simkins (1980) stated that even if closure produce savings, final decisions should depend on the value attached to educational and social outcomes.

Closing a School

School officials have been reluctant to close a school until they are very certain that the school will not be needed again in the near future. The public has not been very willing to overlook mistakes made in the closing of its schools. Moriat (1980) stated that the logic of closing a school does not make the closure any less an emotional and political issue.

And deciding what school to shut down is the touchiest issue of all. Parents who, as taxpayers, may favor cost efficiency moves, suddenly find it outrageous that their children's school has been targeted for closure. (p. 11)

Moriat (1980) also reported staff morale problems resulting from a decision to close a school. In some cases the decision to close a

school divided the community. In other cases the superintendent lost his job because of the decision. Wilkin and Callahan (1978) stated that, in nearly every case, community sentiment against school closing runs very high. These writers stated that without long-range planning and strong citizen participation, the likelihood of closing a school is small.

Gordon and Hughes (1980) presented some criteria that administrators should consider before making the decision to close a school. The criteria included the age of the building, the capacity of the building, the enrollment level, maintenance costs per student, energy costs per student, and racial balance. Simkins (1980) added to this the effect that closure would have on the community and on the educational program of the district.

Brody (1976) stated that because people fear that closing a school will prove to be the end of the community, it is essential to "clearly establish the district's goals, provide a framework on which to judge the value of a short-range program, and show the public the direction in which change will take the schools and the community." (p. 32)

Iannaccone (1979) stated that understanding the process of making school-closing decisions involves the consideration of both efficiency and political factors. Bernstein (1978) stated that it is difficult to deal with enrollment decline, because sometimes the best solutions are not the most politically expedient. Fowler (1978) and Rogers (1978) stressed the necessity of involving the community in the decision-making process, thereby reducing the likelihood of community conflict

and preserving the school district's credibility. Thompson (1979) described other problems involved in merging two schools: determining which building to close and melding two staffs who may have different philosophies and procedures. She also noted some advantages of closing schools. Mergers may present opportunities for reorganizing space, rethinking curriculum, and gaining access to additional resources.

Schomp (1980) reported an example of a decision made by the Denver Public Schools. When the decision was made to close Evans School, the neighborhood in which the school was located was changing from residential to commercial property. The district sold the property through a bidding process to a group which stated its intention to make office space out of it. Seven years later, this property sat in a prime location near the state capitol and the city and county buildings, unused, subject to vandalism. Schomp described the building as an eyesore, for which citizens blame the schools, although the district no longer owns the property.

Amlung (1980) studied the transition from school to surplus property and the consequences for the immediate neighborhood in New York City. She found that, in those cases where alternate uses were found for empty school buildings, the neighborhood retained its character and its style; where buildings were vacant, crime and decay appeared to spread, and the fabric of the neighborhood was torn.

The Renton, Washington, School District provides an example of one district's method of coping with declining enrollment and the uses of excess space. Kloes (Note 3) reported that this district had dropped from an enrollment of 16,500 students in 1978 to approximately

12,500 students in 1982. Since 1968, six elementary schools have been closed and two additional schools have been recommended for closure.

The district policy regarding closure states that:

The Board of Directors will consider the closure and/or assignment to an alternate use of any existing school facility when student enrollment data indicate that the district is unable to effectively offer established instructional programs within the current enrollment patterns. (Policy Statement 1230, Adopted June 24, 1982)

The Renton School District developed some general principles to serve as a guide in drafting the recommended plan for utilization of three of their schools which were closed (Sartori, Hillcrest, and Earlington):

1. First priority would be given to housing Renton School District programs;
2. Elementary schools scheduled for closure will only be considered for alternative use which would allow the possibility for future return to housing regular elementary programs;
3. Outdoor fields and equipment at the schools recommended for closure should be retained for use by the community;
4. Indoor gyms at the schools recommended for closure should be retained for community use;
5. An effort should be made to secure payment for building operation costs from other than K-12 funds;
6. Consideration should be given to impact of the alternative use plan upon other district programs;
7. In the selection of an alternative use for closed facilities, every effort should be made to avoid negative impacts upon the affected community;
8. Consideration should be given to impact upon local traffic resulting from any alternative use plan; and
9. The business community should not be adversely affected through any plan for alternative use. (Note 5, p. 122)

Leasing or Selling

The Seattle Public Schools (Note 6) have developed a policy for the lease or sale of district property. This policy states:

Sale of school district surplus real property will be considered

if the objectives listed below cannot be met more effectively through the long-term lease of property, and if such action:

- * will directly benefit the educational program, or
- * will directly promote a board adopted goal, or
- * will directly benefit low or middle income family housing in the city, or
- * will attract and/or retain families with children into the city, or
- * will directly support the capital improvement program of the school district.

Trade of school district real property will be considered if comparable value (real property or real property plus cash) can be achieved, and if the trade will be beneficial to the school district. (p. 2)

Schomp (1980) reported that the Denver Public-Schools have explored the possibility of leasing unused schools very carefully. This district has developed guidelines (not official policy) for leasing or selling school property. These include:

1. The insistence on a M.A.I. (Member American Institute of Real Estate Appraisers) appraisal before any sale of property.
2. The submission to state and city agencies before opening sale to other entities.
3. The agreement that no facility will be offered for sale to purchasers whose operational objectives are contrary to those of the Denver Public Schools. This has usually meant that buildings are leased or sold to agencies whose goals are directed toward meeting some public need: public health, community service, recreation, and the like.
4. In the case of leasing a school, assignment of space shall be limited to those agencies which offer programs making identifiable contributions to the community.

Schomp found that a growing consensus of the Denver School Board seemed to be that, in all but the most extreme cases, it is wise to hold

surplus property, leasing it for a sufficient amount to cover expenses, and to weigh the difference recoverable by investment should the property be sold and the revenue from leasing should the property be retained.

The question of payment for schools leased or sold to other government entities is of some concern. It might seem logical that one arm of government should not have to pay for something that belongs to the taxpayers. Schomp (1980) pointed out, however, that tax monies come from separate mill levies, and there has not been worked out a fair way to transfer resources of equal value from one entity to another, such as from a school district to a city, without some sort of sales procedure. There are some cases of school and city jointly-owned parks and recreational areas. She also saw the possibility of jointly operated day care centers.

A decision to close a school may affect many other decisions being made in the district; sometimes the decision raises more questions than it answers. Some of the issues which are affected by a decision to close a school are: reduction in staff, enrollment projections, program and staffing projections, school costs, public relations programs, equality of educational opportunity, racial balance, alternate uses of school space, land use and development, the neighborhood school concept, busing, and student/teacher ratios.

Mothballing

One answer to the dilemma is to hold on to the empty school and see what happens to enrollment patterns in the future. One half of the superintendents interviewed in the Educational Facilities (1976) Study

said that they had mothballed schools. The logical choices for mothballing are schools in areas where potential growth or recycled housing would bring in a new school-age population. The age and condition of the building were also considered by these superintendents. If the buildings were well-designed, the district might hang on to it, because it might be financially prohibitive to replace it at a future date. Administrators, however, warned against this "wait and see" attitude. Buildings left unused are especially subject to vandalism. Schomp (1980) reported that, in some instances where the Denver School District has failed to dispose of buildings quickly or has attempted to mothball them, the buildings have been vandalized, and, in two instances, burned.

The Council of Educational Facility Planners (1978) stated that vandalism and decay make mothballing the least desirable solution to the problem of excess space. Curriculum innovations and program changes make it very unlikely that a reopened school will suit future educational needs. Another argument advanced against the concept of mothballing schools is the pressure exerted by those who can't stand to see valuable property sitting idle. A vacant building may be a psychological thorn in the side of parents who didn't want the building closed. They may wonder why their children can't go there, since it is not being used for anything else.

Hickey (1979) suggested ways of preventing school buildings from standing empty. These include: finding alternative uses within the school system, leasing the buildings, and selling the buildings. These options should all be measured by their impact on the community, he

said. These and other uses for excess space will be discussed in the next section of this paper.

Reorganization

In some school districts the answer to excess space may be a reorganization of the local attendance areas and grade divisions. Wilkin and Callahan (1978) stated that a common reorganization plan has been to change the grade level organization of a school building. Because certain grade levels may be experiencing peak enrollments while others are declining, it is sometimes possible to close older or less efficient buildings. For example, rather than grades grouped as K-6, 7-9, and 10-12, a district may restructure on a K-5, 6-8, and 9-12 basis.

The Council of Educational Facility Planners (1978) listed another option which school districts with unevenly distributed school-age populations might explore, that of year-round schooling.

Rather than building schools to keep up with the overcrowding of one part of the district while space is unused in another, districts with this problem could distribute students evenly among the available facilities throughout the school year. This would permit optimal use of the facilities at minimum cost.
(p. 25)

Wilkin and Callahan (1978) stated that, in spite of the often heard claim that districts with fewer than 1200 to 1500 pupils do not justify their cost/quality relationship, consolidation of districts is not always a viable solution. Citizens are concerned with how consolidation will affect their taxes and property values. Then too, closing buildings or creating larger school districts may not always produce significant cost reductions; transportation costs and salaries are often higher in larger districts.

Rather than mandating consolidation, some states have encouraged districts to use cooperative agencies to provide services which are too costly for local units. Iowa has established Area Education Agencies; Illinois and Michigan have Regional Districts; Minnesota has Educational Cooperative Service Units; Oregon has Intermediate Education Service Districts. These provide such services as film service, inservice training, regulatory functions, and other such services as the school districts may request.

Alternatives to Closing

Because of the many pitfalls inherent in the closing of a school, many districts have found it better to look for alternate ways of using excess space, at least until it is certain that the space will never again be needed for classrooms. There are problems with this approach too. Amlung (1980) found these obstacles to finding alternate uses for excess space: lack of coordination at the city and community level, ineffective strategies for protecting school buildings prior to reuse, and the absence of strategic and long-term planning for marketing surplus schools.

Community Agencies

Among the uses which Hechinger (1980) listed for the uses of excess space caused by declining enrollment was that of offering space to the community. This has been done in some cases. Some centers concentrate on a particular segment of the population. In Seattle, Washington, there is a city-run center for Mexican-Americans. Other

excess space has been used for centers for senior citizens and for meeting places for such functions as plays or concerts.

The Council of Educational Facilities Planners (1978) used the term "joint-venturing" to describe an imaginative method of coping with both excess space and fiscal reality. Joint-venturing is the sharing of space, administrative personnel, and dollars by a school and one or more of the agencies of municipal government or private enterprise. The council cited as an example the John F. Kennedy School and Community Center in Atlanta, the Whitmer Human Resource Center in Pontiac, Michigan, and the New North Community School in Springfield, Massachusetts. These buildings house a variety of social service and recreational programs, as well as a school. This same report suggested additional community services which might locate in unused space:

The elderly and the disadvantaged could profit from a community arts and crafts center where skills could be taught, articles made, and the resulting articles sold. Occupational development transcript evaluation centers, designed to assess and accredit individuals for demonstrated skills would be useful to many communities. Human resource centers offering diagnostic and training programs, legal counseling clinics, shelter workshops that provide living and working space for people on public works projects, learning exchange centers where laymen tutor each other, a branch library or paperback lending and reading room, meeting space for local organizations and clubs - all are possibilities for utilizing school space in ways beneficial to the community. (p. 26)

The Seattle Board Policy (Note 6) encourages the use of surplus space within an operating school building at fair rental or lease rates. Services to students and/or building improvements may be accepted as partial payment. The guidelines list as priorities those agencies which: (1) enhance the educational program, (2) are compatible with the educational program, or (3) are beneficial to the community. Some

examples given for agencies which enhance the educational program are: day care centers, preschools, senior centers, special education services required by law and not provided by the district, theatre artists, library services, and human service agencies such as health services and counseling. Examples given for agencies which are compatible with the educational program and beneficial to the community are medical and dental clinics, social service agencies, and special language schools. Business offices would also be compatible with the educational program.

The Seattle School District property report (Note 7) stated that the district now has 19 schools under short or long-term lease. In 1981-82 the Property Management Office negotiated leases for joint use of open schools by 30 day care agencies and 25 other leases for preschool programs, scouting programs, the YMCA, the Seattle Parks Department, and others.

In addition to leasing space in schools still used for classrooms, the Seattle District leases buildings which have been closed. Allen Elementary School, closed but designated as one to be retained by the district, listed these tenants: Seattle Seed School, Lincoln Art Center, Puget Sound Conversion Project, Health Genesis Company, PNA Preschool, Daycare, Yoga Studio, and eight others. (Note 8)

Fairview School has been identified by the Seattle District as a "nonessential school" and is considered for long-term lease or sale. In February, 1982, the proposal review committee recommended that the lease/purchase proposal of Pacific Northwest Bell be accepted. This proposal included use of 50% of the site by their organization for

offices, classrooms, and set and costume storage. The remaining space in the building would be made available on a lease basis to community groups providing day care, preschool, health, and similar services.

Other Educational Uses

In some situations, it is possible to convert unneeded classroom space to other educational uses while maintaining the original program of the school; in other situations, the total facility may be converted to other educational uses. Many of the programs now mandated by law require space beyond that usually needed for classrooms in a school building. Some of these unused classrooms can be used as resource rooms for Chapter I projects, for separate art or music rooms, or for ungraded classes.

The Council of Educational Facility Planners (1978) recommended an expansion at the local level of programs which have received increases in federal funding.

Fulfilling the requirement of Public Law 94-142 "Education for all Handicapped Children", and Section 504 of the Rehabilitation Act of 1973 will mean that school systems will have to house special education in regular school buildings instead of separate schools. (p. 24)

Steinberg (1978) discussed the major problems posed to education by declining enrollments. He suggested that instead of closing school buildings, declining enrollments should be considered as an impetus toward better teacher/student ratios and better programs.

Winter (1981) suggested utilization of excess space for the development of resource centers, expansion of enrichment and practical arts programs, more effective use of space for handicapped students,

and as centers for staff inservice training programs. Smaller school populations also offer possibilities for more effective small group instruction, expansion of individual instruction, and the broadening of exploratory and career awareness programs. Another improvement which could result from declining enrollment is the more innovative use of staff talent and time. New groupings for instruction, the inclusion of teaming as an instructional practice, and differentiating staff responsibilities are other possible means for improving instruction.

The Educational Facilities Laboratories (1974) reported that the Pontiac, Michigan, School District participated in two federally funded projects, one in career education, the other a career development project. These programs were housed in a small elementary school on the periphery of the district. In a different geographic area, this writer learned from a visit to the Energy Resources Center in Portland, that this project, housed in surplus space in Cleveland High School, is partially funded by the Portland Public Schools and partly by government and other sources.

The Renton, Washington, District (Note 5) has set up English As Second Language classrooms in each of its closed buildings. In addition to an ESL program in its Hillcrest School, space has also been used to house the Special Education support staff, Special Education classrooms, the district audiometric suite, and a day care center. Skyway School in the same district was closed in 1971. Later renamed Thomson School, it now houses the district programs for severely handicapped students.

The Council of Educational Facility Planners (1978) stated that empty classrooms might become areas where faculty members could work on curriculum development projects or on preparation of instructional

materials. Art, music, and recreational programs could be expanded. Educational exhibits or student and faculty work might be displayed. Craft shops, music studios, art studios, housing for on-going science projects, business simulation areas, and production or manufacturing setups are other possible uses of excess space recommended by this council.

Alternative Schools

For many school districts, alternative schools may be the answer to educating the student with special needs, the disruptive student, the potential dropout, the pregnant student, or the student with learning disorders.

The Educational Facilities Laboratories (1974) gave some of these uses for excess space: Hayward, California, converted two of its closed elementary schools into alternative centers for disruptive students or potential dropouts. Canton, Ohio, converted an elementary school into an educational center for boys, ages 14 to 17, with behavior problems. The Portland, Oregon, School District has a program for pregnant girls, who have a choice between attending this alternative school or a school in their own neighborhood.

The Council of Educational Facility Planners (1978) suggested that these alternative schools within the regular school system may encourage students to stay in the public schools. This same report stated that alternative school programs can offer a wide range of classroom situations. One example cited is the Minneapolis School District, which has three separate elementary schools, each offering a different style of education, housed in one facility.

Kloes (Note 3) stated that the Renton, Washington, School District made minor change in one of its elementary schools so that it now houses an alternative high school with some 170 students. Kloes' statement concerning community acceptance of this program is significant:

Again, close work with parents and citizens in the neighborhoods was a very important part of the planning process. You appreciate that some parents/citizens would not necessarily want an alternative school located in their neighborhood. However, with effective staff and student cooperation, the support of the superintendent and board, we have not received one complaint during the past two years. (p. 2)

Adult and Preschool Education

The Educational Facilities Laboratories (1974) report listed some uses of buildings for adult and preschool education. Hayward, California, converted an unused elementary school into a center for adult daytime education. The Council of Educational Facility Planners (1978) stated that adult education programs vary greatly.

These programs vary greatly in content and space needs, from the external high school diploma program of Syracuse, New York, now being copies in many other states, to California's program to assist immigrants in learning skills essential to daily living, such as how to find a doctor, understand directions, or interpret the law. Programs like these demonstrate that adult education does not have to be limited to basic after-school courses in recreation, crafts, and job training. (p. 25)

The Renton School District (Note 5) has leased its Sartori building for apprenticeship training for plumbers, pipefitters, refrigeration fitters, lathers, plasterers, asbestos workers, and stationary engineers. There is also pretraining for apprenticeship in the building trades. A financial contribution by the Plumber/Pipefitters International Trust supported the required remodeling.

Headstart and early childhood education programs were housed in excess space in many of the districts studied in the Educational Facilities Laboratories (1974) report; some of these programs were operated in conjunction with day care centers. Sometimes local district funds provided the financial support; sometimes, as is the case in the Montresorri Program in Arlington, Virginia, parents pay for these on a sliding scale. Hayward, California, has a pay-as-you-go operation in one of its elementary schools. It serves children of working parents, preschoolers through third grade. The state pays half of the funds; parents pay the rest.

Needs of the School District Itself

Some districts have used a closed building to serve the needs of the district itself. Collins (Note 4) stated that the Portland, Oregon, School District used one of its old buildings to house such support services as library processing and textbook storage until the district completed its new Educational Services Building. Part of the district's curriculum department is housed on the upper floor of Brooklyn School; the lower floor continues to serve as a primary school. The old Kennedy School, closed in 1975, was used as temporary quarters for students from other schools while their own schools were being renovated. Collins (1981) reported that since its closure, Adams High School has been used to house a newcomer program for Southeast Asian refugee students as well as temporary housing for middle school students while their own school building was being remodeled.

Renton (Note 5) uses its Henry Ford School, closed in 1968, as the curriculum materials center for the district.

Space to Experiment

The Educational Facilities Laboratories (1974) report stated that in New York State unused space in the Freeport School District and in New Rochelle is being used as demonstration models to show how space can be adapted into comfortable environments for children. School districts with similar space problems can send visitors to observe. In the Freeport Elementary School one end of a gym has been converted into a prototype play area. A New Rochelle high school has a resource center, open to the community, in what was formerly three classrooms. Teachers from the area can prepare curriculum packages or attend workshops there.

Legal Issues Involved

Closing a school or finding alternative uses for school buildings may involve more than an administrative decision. A discussion of the subject of uses of excess space would not be complete without some consideration of the legal issues involved. The courts have traditionally given school boards broad discretionary authority to control the uses of school property.

Piele and Forsberg (1974) stated that the use of school property is a public right, subject to certain limitations. They cite as an example California's statute (Cal. Ed. Code 16556) which states that there is a civic center at every public school building and grounds within the state. Hawaii's statute (Hawaii Rev. Stat. 298.23) states that all public school grounds and facilities shall be made available to the public for meetings and for recreational purposes. An additional

Hawaiian statute (Hawaii Rev. Stat. 2989.24) adds the requirement that the proposed use must be a lawful one. Florida statute 235.02 states that school buildings may be used for any legal assembly or as community play centers or as voting centers. Colorado Revised Statute 123-10-19(26) includes within the enumerated powers of the school board the authority to rent or lease school property which is temporarily not needed.

Piele and Forsberg (1974) examined some of the tort cases which might arise from granting the use of school property. (A tort case is a civil action, as opposed to a criminal case.) They cited the Smith v. Board of Education, 464 P. 2d571 (Kan. 1970) case in which an elderly woman sued the board of education, individual board members, the superintendent of schools, and the janitor for injuries suffered when she fell down some steps on her way to a community center in a school. The court, in this case, differentiated between the governmental and the proprietary functions of a school board. Proprietary actions are those in which a state or one of its agencies runs an enterprise that is either commercial in nature or is one that is usually carried on by a private company. Proprietary actions, unlike the governmental functions carried out by state agencies, could make the agency accountable for the torts of its employees. In this particular case, Smith v. Board of Education (1970), the use of the building was determined to be a governmental action, not subject to a tort suit. Piele and Forsberg added this comment: "Regardless of how designated, the transaction does not rise to the dignity of a rental, creating the relationship of landlord and tenant." (pp. 21-22)

In a New York case, *Lessin v. Board of Education of City of New York*, 161 E. 160 (1928), a suit was initiated on behalf of a boy who was injured when he fell down a coal shaft which abutted a sidewalk. The shaft was on school property; the sidewalk was a public sidewalk, the responsibility of the city. The court, in this case, found that both parties, the school district and the city, were liable for maintaining the shaft in a safe condition.

Leasing and Selling

The courts have traditionally given to school boards the same discretion in leasing or selling property as they are given in other areas of school management. In the *Blair v. City of Fargo*, 171 N.W. 2d (N.D. 1969) case, a Fargo, North Dakota, School Board decided to sell an old building in an area of dwindling student population. Taxpayers challenged this move, arguing that the school board lacked the authority to sell the property. The court disagreed. Under the statutes that set it up, the Fargo School Board did have the power to purchase, sell, exchange, and lease school buildings for school purposes. To interpret the section of the statute which required that school properties be used "for school purposes" as forbidding the sale or lease of property would block any disposition of old, useless property.

In the *City of Manitowoc v. Board of Education of City of Manitowoc*, 229 N.W. 652 (Wis. 1930) case, the court found that state statutes legally empowered boards of education to possess, maintain, control, and manage school property. White (1980) stated that when the California Supreme Court refused to hear an appeal that sought to force

local school boards to hold referendums before closing schools, it affirmed the concept of the closure of a school being an administrative act, not subject to referendum.

There have been other cases in other states which have affirmed the right of a local district to close a school without a vote of the people. In an Arkansas case, *Davis v. Board of Education of North Little Rock*, 674 F.2d 684 (8th Cir. 1982), a parent of a minority student alleged that the decision to close a school was racially motivated. The court ruled in favor of the school board. The preponderance of evidence, it stated, was that the board's decision was motivated by declining enrollment, and that minority students were transferred to equivalent facilities. The court also stated that these factors were to be evaluated in cases challenging the use of school facilities:

The existence of valid, nonracial, educational reasons for closing facilities; adequacy of facilities to be closed; adequacy of facilities where minority students would be transferred; ability of facilities to handle transferred students; motivation of school board in seeking to close facilities; and consideration of alternatives short of closing facilities. ("Recent Developments in the Law," 1982, p. 600)

In another action challenging the proposed closing of elementary schools, *Tunley v. Municipality of Anchorage School District*, 617 P.2d 490 (Alaska 1980), parents argued that state department regulations were violated, that the school district did not have the authority to act on its own, and that parents were subject to constitutional deprivation of property without due process, because the school board had issued no notice prior to its decision. In this case, the court held that a school board does have the authority to close schools for cause, but that parents do have property right which might be affected by the

closing of a school, this protectable right being subject to due process. The court stated that five days notice was sufficient to satisfy this requirement. The district was required to conduct public hearing after adequate notice.

In still another case a class action suit was brought against a school district, *State ex rel. Waldeck V. Groedkin*, 267 N.W.2d (Wisc. 1978) to determine whether the power to close a school and convert it to other uses resides with the electors or with the school board. The plaintiffs alleged that at no time prior to the decision to close the school was a meeting held at which residents could vote on the issue. The court rules in favor of the school district. It held that, while Wisconsin statutes give the annual meeting of electors the power to designate sites and authorize the sale of school property, the power to decide whether schools are to be closed and, if so, which ones will be closed, resides with the school board.

In 1978 a part of a school district in Texas, *Fort Bend Independent School District v. City of Stafford*, 449 F. Supp. (S.D. Texas 1978), sought to break away from a parent school district. The parent district alleged that the new district would have a negative effect on the parent district's desegregation plan. The court rules in favor of the parent district. In rendering its decision, the court stated that:

The break away school district would reduce the tax base of the parent and substantially cut the enrichment programs used to facilitate integration. The parent district's ability to zone blacks into neighborhood schools would be restricted. The constitutional mandate to eliminate discrimination is broad enough to protect districts engaged in the process of integration from such undermining effects of break away districts. ("Recent Developments in the Law," 1979, p. 102)

Cases where the school district has leased or sold property to a private academy or school group following an order to desegregate were discussed by Piele and Forsberg (1974). In *Wright v. City of Brighton*, 441 F.2d 447 (5th Cir. 1971) and *Graves v. Board of Education*, 465 F. 2d 887 (5th Cir. 1972) this practice was found to be illegal. The Fifth Circuit Court of Appeals stated:

The law is settled that no matter how neutral a piece of legislation or official action appears on its face, if its practical effect is to place a burden on one racial group, then such a burden constitutes a denial of equal protection. (Piele and Forsberg, p. 31).

In the *Taylor v. Coahoma County School District*, 345, F. Supp. 891 (N.D. Miss. 1972) case, a Mississippi Federal District Court upheld the sale of school district property to a purchaser who stated his intention of using the property for farming operations, warehouses, and shops. The court approved the sale on the condition that a reverter clause be included in the deed to specify "that should the purchaser or anyone succeeding him violate the covenant by using the property for a racially segregated school, the title would revert to the grantor." (Piele and Forsberg, p. 32)

An Oregon case, the LUBA Case, *Westside Neighborhood v. School District 4J*, LUBA N. 81-096, (1981) concerned the decision of a school district to close an elementary school. The petitioners contended that the district violated goals developed by the Land Conservation and Development Commission (LCDC) when it closed the school (Note 9). Petitioners charged that the district had failed to adopt a program to deal with the negative impacts on the school's historical value which would result from closing the school.

Petitioners asserted that a further violation of the goals occurred because the district considered and applied standards without announcing in advance of its decision that those standards were specific program requirements which the district found could not be met at the school, given the financial resources available.

The Land Use Board of Appeals (LUBA) concluded that the district's failure to adopt a program to protect the school's historic value before deciding to close the school did not violate land use goals and that no violation of goals occurred when the district announced the closure without announcing its standards for closure in advance of the decision to close the school, because the district's school closure policy, of which the petitioners were aware, put petitioners on notice that the district would be considering its ability to meet adopted program requirements at the school.

Reversion Clauses

At times the courts have been called upon to interpret clauses in deed that originally granted land to school districts. The most common clause in these disputed deeds is a "reverter" clause which causes the property to revert to the grantor, or his heirs, when a board of education abandons the property. The *Ballantyne v. Nedrose Public School District No. 4*, 117 N.W. 2d 551 (N.D. 1987) case concerned a contract containing such a clause. The school district had continued to use the school for storage, but not for classrooms. The district had also leased the property to a church. The Supreme Court of North Dakota found that the district's use of the build for storage of equipment and

supplies was evidence of an intention to use the building for school purposes and did not amount to abandonment so as to invoke the reverter clause in the deed.

In a Colorado case, *School District RE-2(J) v. Panucci*, 490 P.2d 711 (Colo. 1971), the dispute concerned land that had been leased to the district for 99 years. The lease stated: "The party of the second part shall not ... use or permit to be used for any purpose except as a schoolhouse, without the written consent of the party of the first part." (Piele and Forsberg, 1971, p. 28) An elementary school was constructed on the site and used until the district was reorganized and absorbed into another district. When this happened, the school building was boarded up and was no longer used. The court determined that the school district had terminated the lease and forfeited the property.

Summary

While the problem of overall declining school population may not last beyond the 1980's, the problem of managing school space will continue as the population migrates to more favorable living areas, as new mining operations draw workers to previously sparsely settled areas, and as older buildings become unusable for new educational trends. Thus, the necessity for long-range planning for the uses of classroom space no longer needed for classrooms will continue.

The writers surveyed stressed the desirability of involving the public in decisions regarding the uses of excess space. District policies and guidelines have been developed by many districts; these have helped to make decisions seem less arbitrary and more acceptable to

the public. As a general rule, a community feels tied to its neighborhood school and believes that the closing of that school may be the harbinger of the decline of the neighborhood. Where the community has been a part of the decision, there is less likely to be opposition when a school must be closed or used for some purpose other than instruction.

The consensus among the writers seemed to be that, while closing a school may sometimes be necessary, other uses for the space should be considered first. The possibility of using the space for alternate educational purposes should be a first priority. Other possibilities included leasing the space to other community or governmental agencies or opening the space to community groups. Because of the problems of vandalism and public sentiment against vacant buildings, some alternate use should be made if the building is no longer needed for classroom space.

There are legal issues involved when a district decides to use school property for other than educational purposes. The courts have upheld the right of a school board to lease or sell school property, provided the action is not seen as arbitrary or as an attempt to circumvent desegregation. Reversion clauses in district properties may make the lease or sale impractical. Districts which have leased properties have found it advantageous to find agencies whose goals are consonant with those of the district before choosing them as tenants.

CHAPTER III

RESEARCH DESIGN AND METHODOLOGY

Introduction

This chapter describes the research methods used in the study. There are two major divisions. The first is concerned with the compilation of data concerning the public school districts of Oregon. The second part is an examination of the levels of conflict present when a school was closed.

Design of the Investigation

The first part of the study was designed to investigate these questions:

1. To what extent has a decline in enrollment necessitated some adjustment in the uses of building space?
2. How have public school districts used or disposed of this excess space?
3. What methods have district administrators used to involve or inform the community of decisions concerning the uses of building space?
4. What problems do administrators foresee as a result of enrollment changes within the next three years?
5. To what extent has reorganization within the district taken place in districts which are declining in enrollment?

6. To what extent are reversion clauses written into deeds of properties of districts which are declining in enrollment?
7. How many districts which have declined in enrollment have closed schools since 1970?
8. How many schools have these districts closed during this time?
9. With how many of these did the district experience conflict?
10. What criteria were employed in the decision to close a school?

The second part of the study examined issues concerning the decision to close a school. These were:

1. The number of buildings closed and the sequence of closure.
2. The time element involved in the closure.
3. The tenure of the superintendent.
4. The number of members of the school board and their tenure.
5. The presence or absence of written policies and/or guidelines concerning closures.
6. The presence or absence or other issues within the community which might conceivably harden any opposition to the closing of a school.
7. The type of building closed.
8. The level of opposition to the closing.
9. The form of opposition taken in the community.
10. The quality and location of the building closed.
11. The financial result of the closing.

Twenty-three districts which had closed one or more schools since 1977 were examined. To explore the issues which might be factors in conflict surrounding the closure of a school, these 23 districts were

divided into two categories: (1) Those which have experienced major conflict, and (2) Those which experienced a minimum of conflict over the decision to close a school. This division was accomplished by dichotomizing conflict into two areas using Lindelow's (1981) "Stages of Conflict". Lindelow listed these stages of conflict:

1. The phase of anticipation, in which, for example, a manager knows of an impending change and projects its consequences.
2. The phase of conscious, but unexpressed, difference. Word leaks out about the change, and a feeling of tension begins to build in the organization.
3. The phase of discussion. Information is formally presented about the change. Differing opinions begin to emerge.
4. The phase of open dispute. Differences become more sharply and explicitly defined.
5. The phase of open conflict. Each disputant tries to force his or her view on the others. The only possible outcomes now are win, lose, or compromise.

A district which had reached either the phase of open dispute or open conflict was considered for this part of the study as a "major conflict" district. Those which only reached one of the first three of Lindelow's categories were designated as "little conflict" districts.

Superintendents of the 23 districts were asked to respond concerning the level of opposition involved in the closing of the school. The questionnaire (Appendix A) listed these levels of conflict:

1. No opposition.
2. Some citizen complaints.

3. Moderate opposition (no powerful groups).
4. Strong opposition (limited group activity).
5. Intensive opposition (extensive organized group activity and community polarization).

Those districts whose superintendents indicated either strong or intensive opposition were categorized as districts experiencing major conflict. Those whose superintendents indicated no opposition, some citizen complaints, or moderate opposition were categorized as little conflict districts.

In addition to the scale of conflict described in the preceding paragraph, the questionnaire listed six forms of opposition which conflict might take. Superintendents were asked to indicate which, if any, of these forms was present when the district closed a school:

1. Attempt by an organized group to force the resignation of the superintendent.
2. Effort by an organized group to recall member(s) of the school board.
3. Citizen(s) running for election to school board on a "Save Our Schools" (or similar) slogan.
4. Defeat of school budget or levy or bond measure.
5. Legal action to keep school open.
6. Threat of secession from school district.
7. Other. (This category was included in the questionnaire but was not indicated by any of the superintendents returning the questionnaire.)

An indication of the presence of any one of these factors placed the district in the major conflict category for the purpose of this study. A comparison was then made of the little conflict/major conflict districts.

The Population

There were three stages of development in the selection of the three samples involved in the study. The 309 public school districts listed in Oregon School Directory 1982-83 (Oregon Department of Education, 1983) comprised the members of the first sample. These were called "all districts" in the study. The second group examined was drawn from the first sample. To form this subsample, a comparison was made of 1969-70 average daily membership attending (ADMa) figures with those of the 1979-80 school year for each of the 309 districts in the first sample. Figures for this were obtained from the Oregon State Department of Education (Note 1). When it was found that a district had declined 10 students or more in enrollment during the 10 year period being compared, that district was selected for inclusion in the study. Of the 309 districts listed in the Oregon School Directory 1982-83, 119 met this criterion. Table I summarizes the growth and decline of enrollment in all districts during this 10 year period.

Six districts had been reorganized during the 10 year period used in the comparison of enrollment for selection of this sample. A questionnaire was sent to each of these districts so that, if their inclusion in the study were appropriate, they could be included.

A newspaper clipping file was maintained for 1982 and 1983. School districts mentioned in discussions of declining enrollment or

TABLE I
CHANGE IN ENROLLMENT IN 309 OREGON SCHOOL DISTRICTS
1970-1980

Percentage of Change	Actual Number of Districts	Percentage of Districts
51% or greater decline	9	3
46-50% decline	4	1
41-45% decline	6	2
36-40% decline	5	1
31-35% decline	10	3
26-30% decline	5	2
21-25% decline	17	6
16-20% decline	18	9
11-15% decline	17	5
06-10% decline	27	9
01-05% decline	33	10
No change	8	3
01-05% increase	20	7
06-10% increase	21	7
11-15% increase	16	5
16-20% increase	13	4
21-25% increase	8	2
26-30% increase	8	2
31-35% increase	6	2
36-40% increase	7	2
41-45% increase	4	1
46-50% increase	6	2
51% or greater increase	35	12
Totals	303	100

Note: Six reorganized districts were not included in the comparison.

school closures in these articles were included in the sample, even if the district had not been identified by the previous methods of obtaining the sample. Districts identified by these methods were called "declining districts".

A questionnaire (Appendix A) was mailed to the superintendents of the 126 districts identified by a decline in enrollment, reorganization, or by mention in a newspaper article. Of these, 106 returned the questionnaire, a return rate of 84.12%. Table II summarizes the change in enrollment in these 106 districts during the time period being examined.

The third sample was drawn from the 106 declining districts. Twenty-three of the superintendents returning the questionnaire reported that one or more schools had been closed in their districts since 1977. These 23 districts formed the third sample in the study. They are referred to as "closure districts" in this report. Table III summarizes the change in enrollment in these districts.

The last school closed by each of these 23 districts was examined. When the district had closed more than one school at the same time, and that school was the last closure, each school was examined separately. In all, 33 schools were considered in this part of the study.

Data Gathering Procedures

A questionnaire (Appendix A) was designed to be sent to each of the 126 Oregon public school superintendents of districts identified by the procedures described earlier in this chapter, the declining districts. This instrument was field tested in five school districts

TABLE II
CHANGE IN ENROLLMENT IN 106 SELECTED OREGON SCHOOL DISTRICTS
1970-1980

Percentage of Change	Actual Number of Districts	Percentage of Districts
51% or greater decline	6	6
46-50% decline	2	2
41-45% decline	3	3
36-40% decline	4	4
31-35% decline	7	7
26-30% decline	2	2
21-25% decline	15	15
16-20% decline	11	11
11-15% decline	15	15
06-10% decline	20	20
01-05% decline	12	12
No change	2	2
01-05% increase	1	1
06-10% increase	0	0
11-15% increase	1	1
16-20% increase	0	0
21-25% increase	0	0
26-30% increase	0	0
31-35% increase	0	0
36-40% increase	0	0
41-45% increase	0	0
46-50% increase	0	0
51% or greater increase	2	2
Totals	103	100

Note: Three reorganized districts were not included in the comparison.

TABLE III
CHANGE IN ENROLLMENT IN 23 SELECTED OREGON SCHOOL DISTRICTS
1970-1980

Percentage of Change	Actual Number of Districts	Percentage of Districts
36-40% decline	2	9
31-35% decline	3	13
26-30% decline	0	0
21-25% decline	2	9
16-20% decline	3	13
11-15% decline	4	17
06-10% decline	2	9
01-05% decline	4	17
No change	1	4
01-05% increase	0	0
06-10% increase	0	0
11-15% increase	1	4
16-20% increase	0	0
21-25% increase	0	0
26-30% increase	0	0
31-35% increase	0	0
36-40% increase	0	0
41-45% increase	0	0
46-50% increase	1	4
Totals	23	99

Note: Percentage does not total 100% because of rounding of numbers.

in Oregon and in Washington, districts in which the decline in enrollment was of sufficient magnitude to require some adjustment in the ways space was being used in the district. In addition to the field testing of the questionnaire, interviews were conducted with four school administrators in four different districts. The districts selected for field testing and for interviews were varied enough to present a good representation of the districts to be included in the study. Recommendations from the field testing and from the interviews were incorporated into the questionnaire before it was mailed to the districts included in the study.

The Confederation of Oregon School Administrators provided a letter of support for the study (Appendix B) to be included with the mailing of the questionnaire. It is believed that this letter, together with the high degree of interest in the topic expressed by superintendents responding to the survey, contributed to the high rate of return of the questionnaire. Three weeks following the first mailing, another copy of the same questionnaire with a second letter requesting the return of the questionnaire was mailed to those superintendents who had not, as yet, returned the questionnaire. Copies of these letters, together with a letter from Dr. Loyde Hales, of Portland State University, are included as Appendices C, D, and E.

The 20 districts from which the questionnaire was not returned were examined. Tables IV and V compare the size and type of these districts with the districts which did return the questionnaire. This comparison indicates that the sizes and types of districts are sufficiently represented in the sample to make this a valid study.

TABLE IV

COMPARISON OF SIZE OF DISTRICTS RETURNING
AND NOT RETURNING THE QUESTIONNAIRE

Size of District	<u>Number of Districts</u>		<u>Percentage of Districts</u>	
	Response	No Response	Response	No Response
3000 or more ADMr (1982)	14	3	13	15
1000-2999 ADMr (1982)	20	3	19	15
500-999 ADMr (1982)	20	2	19	10
100-499 ADMr (1982)	38	5	36	25
Less than 100 ADMr (1982)	14	7	13	35
Totals	106	20	100	100

TABLE V

COMPARISON OF TYPE OF DISTRICTS RETURNING
AND NOT RETURNING THE QUESTIONNAIRE

Type of District	<u>Number of Districts</u>		<u>Percentage of Districts</u>	
	Response	No Response	Response	No Response
Unified	79	9	74	45
Elementary	23	7	22	35
Union High School	4	4	4	20
Totals	106	20	100	100

Material from the questionnaire was compiled and recorded on computer data cards with each district and school identified by a code number to insure confidentiality. The data were processed on the Honeywell computer at Portland State University using SPSS programming (Nie, Hull, Jenkins, Steinbrenner, and Bent, 1975). The findings were then in a form ready to be analyzed and reported. These are found in Chapter IV of this document.

Analysis of the Data

Two procedures were used to analyze and present the data. A frequency distribution was used to tabulate and present the data for the 309 districts in the first sample and for the 106 declining districts. Pearson correlation coefficients were then computed to determine whether there were any correlation among the variables being examined. The mathematical process was done on the Portland State Honeywell computer using SPSS programming (Nie et al., 1975).

The Frequency Distribution

A frequency distribution was used to tabulate the data given for the 309 districts in the first sample and for the 106 declining districts. Information given in this section of the report includes:

1. Type and size of district.
2. Comparisons of 1969-70 and 1979-82 ADMr figures.
3. Percentage of increase or decline during the 12 year period 1979-1982.
4. Summary of 1982 expenditures per ADMr.
5. Tax rates for the districts studied.

6. The uses of excess space.
7. Input into the decision-making process.
8. Superintendents' perception of problems associated with enrollment changes within the next three years.
9. The prevalence of reversion clauses in deeds of district properties.
10. The number of schools closed in these districts since 1970.
11. The number of conflicts associated with closures.

Pearson's Correlation Analysis

A Pearson correlation procedure was used to analyze the part of the study concerning school closures. Relations among the following factors were examined:

1. The year and sequence of closure,
2. The time element involved in the closure of the school,
3. The tenure of the superintendent at the time of closure,
4. The number of school board members and their tenure at the time of the school closure,
5. The existence of written policies and guidelines in districts contemplating the closure of a school,
6. Other issues within the community which might intensify opposition to the closure of a school,
7. The type, quality, and location of the building closed,
8. The level of opposition associated with the closing, and
9. The financial result of the closing.

These findings were presented in tabular form.

CHAPTER IV

ANALYSIS AND PRESENTATION OF DATA

Introduction

It is the function of this chapter to report and discuss the findings of the study. The report begins by summarizing the size and type of the 309 public school districts in Oregon and then of the 106 declining districts and 23 closure districts in the two sub-samples. The first sample of 309 districts is called "all districts" in this report. The second sample, the 106 districts which returned the questionnaire, is called "declining districts". The third sample, the 23 districts which closed one or more schools during the time period being studied, is called "closure districts".

Two procedures were used to analyze the data. Frequency distributions were used to tabulate and present the findings of the survey. Pearson's coefficients of correlation were used to determine whether there were any relationships among the variables being examined in the closure districts.

Extent of the Decline

A comparison of 1981-82 ADMr figures with those from the 1969-70 period revealed a shift in enrollment in Oregon public schools during this time period. In 1981-82 there were 436,923 resident

students attending Oregon public schools, an increase of 9,479 students (2%) over the 1969-70 total enrollment figure of 427,444 students. In 1969-70 these Oregon districts ranged in size from a small district with six students to the largest one which had 70,995 average daily membership resident students (ADMr). By 1981-82 the range in size of districts had changed; the largest one now had 48,175 ADMr; the smallest had four ADMr. Thus, although the total number of resident students in all Oregon public school districts had increased, the increase in total number of students had not been uniformly distributed among all districts. For some districts the decline in enrollment had been substantial.

To compare the change in enrollment in each district, a table showing percentage of growth or decline was prepared for each district. Table VI summarizes this growth or decline in the 309 districts during this twelve-year period. Comparisons are based on average daily membership resident (ADMr) figures supplied by the Oregon State Department of Education (Note 1).

In the 106 districts which returned the questionnaire, the average daily membership of resident students was 218,128, a decline of 21,339 resident students from the 238,467 ADMr in 1969-70. The comparison of these percentages of change in enrollment and for those 23 closure districts is summarized in Table VI.

Each group of districts, all districts, declining districts, and closure districts, was categorized by size, using the same enrollment categories as those used in materials supplied by the State Department of Education (Note 1). This information is given in Table VII.

TABLE VI
 PERCENTAGE OF CHANGE IN ADM_r IN OREGON DISTRICTS
 1969-70 to 1981-82

Percentage of Change	All Districts		Declining Districts		Closure Districts	
	Number	Percent	Number	Percent	Number	Percent
- 51% or more	6	2	6	6	0	0
- 46-50%	12	5	5	5	1	5
- 41-45%	4	2	2	2	0	0
- 36-40%	9	3	5	5	3	13
- 31-35%	7	2	4	4	1	5
- 26-30%	16	5	8	8	2	9
- 21-25%	16	5	13	13	2	9
- 16-20%	21	5	14	14	3	13
- 11-15%	21	7	14	14	2	9
- 06-10%	33	11	16	16	4	18
- 01-05%	26	9	5	5	2	9
No Change	5	2	1	1	0	0
+ 01-05%	20	6	6	6	1	5
+ 06-10%	14	5	2	2	1	5
+ 11-15%	13	4	0	0	0	0
+ 16-20%	12	2	0	0	0	0
+ 21-25%	9	2	0	0	0	0
+ 26-30%	5	2	0	0	0	0
+ 31-35%	4	1	0	0	0	0
+ 36-40%	8	3	0	0	0	0
+ 41-45%	3	1	0	0	0	0
+ 46-50%	9	2	0	0	0	0
+ 51% or more	25	9	0	0	0	0
Totals	297	100	101	100	22	100

Note: Districts in which reorganization made a comparison invalid are not included.

TABLE VII
SIZE OF DISTRICTS STUDIED

Size of Districts	All Districts		Declining Districts		Closure Districts	
	Number	Percent	Number	Percent	Number	Percent
3000 or more ADMr	33	12	14	13	10	44
1000-2999 ADMr	57	18	20	19	0	0
500-999 ADMr	44	14	20	19	8	35
100-499 ADMr	100	32	38	36	4	17
Less than 100 ADMr	75	24	14	13	1	4
Totals	309	100	106	100	23	100

Table VIII summarizes the findings regarding the types of districts in the study. Categories are the same as those used by the Oregon State Department of Education for reporting average daily membership figures (Note 1). Some of the districts classified as unified districts contain both elementary and high schools; others are elementary districts containing only elementary schools. When several of these local elementary districts unite to create a high school for their students, they form a union high school district. An understanding of

TABLE VIII
TYPES OF DISTRICTS STUDIED

Type of District	All Districts		Declining Districts		Closure Districts	
	Number	Percent	Number	Percent	Number	Percent
Unified	183	59	79	74	22	96
Elementary	103	34	23	22	1	4
Union High School	23	7	4	4	0	0
Totals	309	100	106	100	23	100

these types of districts is necessary for an understanding of the tax structure of the district. This fact of one high school tied to several elementary school districts also explains why no union high school districts are included in the closure districts; to close the school would mean closing the district, leaving the elementary districts with no high school attached to them.

Expenditures

The 1981-82 expenditures per ADMr student were examined for each of the three samples. As Table IX shows, this expenditure for all districts ranged from a high of \$11,721 to a low of \$1,613 per ADMR for all districts. The amount of expenditure per resident student was not necessarily related to the tax rate of the district. The district tax rate for all districts ranged from a low of \$.65 per \$1,000 assessed value to a high of \$37.37. The mean for local districts only (not including union high districts) was \$11.35 per \$1,000.

For elementary districts this tax does not reflect the total tax rate for K-12 public schools. These districts pay, in addition to the local tax rate, an additional tax to the union high school district. These total tax rates, when examined for all districts, revealed a range from a low rate of \$2.62 to a high of \$44.97 per \$1,000. The mean for total tax for the local district was \$14.20 per \$1,000.

As stated above, this total tax rate is not always related to the cost of educating a resident student. One district had a low district tax rate of \$.90 for the district and a total tax rate of \$3.50 (compared to a district mean of \$11.35 and a total mean of \$14.20 for all districts) and spent \$2,775 to educate each resident student (compared to a mean expenditure of \$3,168 for all districts). The district was the lowest total tax rate, \$2.62, spent \$3,541 per resident student. \$11,721, had a total tax rate of \$3.60 per \$1,000. One district had a total tax rate of \$23.51 and spent \$3,021 per resident

TABLE IX
COMPARISON OF TAX RATES AND EXPENDITURES
1981-81

Variable	All Districts	Declining Districts	Closure Districts
Expenditure Per ADMr			
High expenditure	\$11,721	\$7,513	\$3,265
Low expenditure	1,613	2,096	2,132
Mean expenditure	3,168	3,251	2,933
District Tax Rate			
High tax rate	37.27	23.69	16.99
Low tax rate	.65	.90	6.64
Mean tax rate	11.35	12.14	13.02
Total Tax Rate			
High tax rate	44.97	31.69	16.99
Low tax rate	2.62	3.59	6.64
Mean tax rate	14.20	13.09	13.33

student. Another district, spending a comparable amount per student, \$3,022, had a total tax rate of \$9.68 for K-12 education.

The 106 declining districts had a mean expenditure of \$3,351 per resident student, compared to a mean of \$3,168 for all 309 districts in Oregon. The mean tax rate was \$12.15 for declining districts, compared to a mean of \$11.35 for all districts. The mean for the total tax rate in declining districts was \$13.09, compared to a mean of \$14.20 for all Oregon districts.

The 23 districts which reported closing a school had a mean expenditure of \$2,933 per resident student, compared to a mean expenditure of \$3,168 for all 309 districts. The mean tax rate for district only was \$13.09 compared to a mean of \$11.35 for all districts. The mean of the total tax rate for these 23 closure districts was \$13.33, compared to a mean of \$14.20 for all districts in Oregon. Table IX summarizes these tax rates and expenditures. Figures are computed on an ADMr basis and were supplied by the Oregon State Department of Education (Note 1).

As Table X shows, a significant negative correlation was found between the percentage of change in enrollment and the total tax rate in closure districts ($r = -.487$; $p = .018$). As the percentage of decline increased, the total tax rate in these districts declined. In declining districts, the cost per student rose ($r = -.412$; $p = .000$) even though the percentage of decline was increasing. Some of the reasons for this phenomenon were discussed in the chapter reviewing the literature.

TABLE X
CORRELATION: PERCENTAGE OF CHANGE
AND COST OF EDUCATION

Variable	Declining Districts	Closure Districts
Tax for District Only	r= .004 p= .968	r= -.387 p= .068
Total Tax for K-12 Education	r= -.011 p= .909	r= -.487 p= .018*
Expenditure per Resident Student	r= -.412 p= .000*	r= -.177 p= .417

* significant correlation

The Uses of Space

Of the 106 superintendents returning the questionnaire, those from 49 districts (46.2%) reported that no adjustment in building space had been necessary. Another 57 superintendents, or 53.7%, reported the decline in enrollment in their districts as being great enough to necessitate some adjustment in the ways in which building space has been used.

As Table XI indicates, the largest percentage of declining districts used excess space to house other programs. Of these, 31 districts (29.2%) used space to house programs mandated by the local, state, or federal government. Thirty-four (32%) used space for facilities such as a music rooms or a curriculum center for programs decided upon by the local district.

TABLE XI
THE USES OF SPACE

Uses of Space	Declining Districts		Closure Districts	
	Number	Percent	Number	Percent
District was reorganized so that the number of students per building was more evenly divided.	22	20.7	11	47.8
Space was used for classrooms so that the number of students per class was reduced.	10	9.4	1	4.3
Space was used to house other programs mandated by local, state, or federal government.	31	29.2	13	56.5
Space was used to house other programs decided upon by the district.	34	22.0	14	60.9
Space was used to house support services for the district.	16	15.0	8	34.8
Space was used to accommodate a community program.	10	9.4	7	30.4
Space was leased to some other agency.	14	13.2	13	56.5
Space was sold to some other agency.	5	4.7	5	21.7
Building was torn down to make way for something new.	2	1.8	1	4.3
Space was used for storage.	26	24.5	13	56.5
Space was unused.	24	22.6	12	52.2
Space was held for future growth.	20	18.8	9	39.1
Other uses.	2	1.8	1	4.3
None of these.	49	46.0	0	0

Twenty-two (21%) of the districts had been reorganized so that the number of students per building was more evenly divided. For example, adding a sixth grade to a junior high building or changing from a K-8, 9-12 organizational structure to a K-5, 6-8, 9-12 pattern. Sixteen districts (15%) used space to accommodate support services for the district, services such as offices and library processing facilities. Twenty districts (19%) are holding excess space in anticipation of future growth in the district. Twenty-six (25%) used space for storage. Twenty-four have unused space.

Ten (9%) of the districts used space for classrooms so that the number of students per classroom was reduced. Another ten (9%) used excess space to accommodate a community program. Districts which reported using space for community programs listed a community college outreach program, a community center, latchkey programs, county services, a senior center, community schools, and park bureau programs as users of space.

In 14 (13%) of the districts, excess space had been leased to some other agency. These districts reported leasing space to: headstart, pre-school, and kindergarten programs; private schools; a county educational unit; a city; a church; a computer company; a community college; a Native American agency; a youth club; a grange; a private library; a hospital; and a center for adult education.

Five (5%) of the districts had sold some of their excess space. One (1%) of the districts reported selling space to a private company. Other districts reported selling space but did not specify the type of purchaser.

Two (2%) of the districts had torn down a building to make way for something new. Another two (2%) had used space for the category labeled "other uses"; one of these districts used space for business meetings; another did not specify the use. Totals for all uses of excess space do not equal 100%, because many districts are using space for more than one purpose. The uses of excess space are summarized in Table XI. Figure 1 shows this information in graphic form.

Forty-nine (46%) of the declining districts and 21(91%) of the closure districts reported more than one use of excess space. The number of uses is summarized in Table XII. Figure 2 presents the number of uses of space in graphic form for the 57 districts which had a decline in enrollment great enough to necessitate alternate uses of space. Figure 3 shows uses of space by the 23 districts which closed schools since 1977.

Reorganization

At times districts with declining enrollments reorganize so that they can share revenues and maintain a quality program with dwindling numbers of students. Another option which districts may use is to reorganize within the district itself, adding a sixth grade to a junior high building, for example, or changing the district organizational pattern from a K-8, 9-12 structure to a K-6, 7-9, 10-12 one. An attempt was made to determine the extent to which this has taken place in Oregon districts during the years 1970-83.

Only a small percentage (3.8%) of the declining districts had reorganized with another district during the time period being studied. In closure districts 8.7% had been reorganized with another district

Figure 1. Uses which districts have made of excess space
Resulting from decline in enrollment, 57 districts reporting.

TABLE XII
USES OF SPACE

Number of Uses	<u>Declining Districts</u>		<u>Closure Districts</u>	
	Number	Percent	Number	Percent
one	8	7.5	2	8.7
two	9	8.5	2	8.7
three	12	11.3	4	17.4
four	10	9.4	3	13.0
five	6	5.7	2	8.7
six	6	5.7	6	26.1
seven	2	1.9	1	4.3
eight	2	1.9	1	4.3
nine	2	1.9	1	4.3
Totals	57	53.8	23	100

Note: Forty-nine districts (46.2%) with declining enrollment reported no alternate uses of space.

Figure 2. Number of uses of excess space by 57 districts.

Figure 3. Number of uses of excess space by 23 districts.

during this time. An examination of the characteristics of the districts summarized in Table XIII revealed that in each case smaller districts had joined another district or merged with several districts to form a larger district. Smaller districts do not always have the option of closing a building when enrollment declines; merger with another district is one solution to the problem of decline. The homogeneous nature of the four districts which reorganized with another district indicates that this was the case.

TABLE XIII
DISTRICT REORGANIZATION

Variable	Declining Districts		Closure Districts	
	Number	Percent	Number	Percent
Reorganized With Another District	4	3.8	2	8.7
Reorganized Within District	22	20.8	11	47.7

Twenty-two (20.8%) of the districts had undertaken reorganization within the district as a means of coping with declining enrollment. Eleven (47.8%) of the closure districts had reorganized within the district. In these closure districts there was a significant correlation between the percentage of decline and reorganization within the district ($r = .502$; $p = .015$). A smaller decline in enrollment was likely to have been taken care of by restructuring the district. A major decline in enrollment was more likely to have been taken care of in some other way.

Community Involvement

Districts used varied means to inform or involve the community in decisions concerning the uses or disposition of excess space. Administrators stated that the school board made the ultimate decision concerning the uses or disposition of space, yet, as Table XIV shows, each district reported some involvement of others in the decision-making process. In some districts this method was an administrative decision; in others it was a citizens' advisory group. In some districts the community was actively involved; in others it was informed of the decision.

Twenty-one (19.8%) of the declining districts used only one method. Of these, administrative decision was the most commonly reported. In declining districts, 18 (16.6%) relied upon administrative decision alone. More often, administrative decisions were used in conjunction with other forms of community or staff involvement. In declining districts, 49.1% used administrative decisions, either alone or in conjunction with other forms of involvement; in closure districts, it was 87.0%.

A task force was used in eight (7.5%) of the declining districts and in seven (30.4%) of the closure districts in decisions regarding the uses and disposition of excess space. In closure districts a significant correlation was found between the use of a task force and the level of opposition associated with the closure of a school. This issue is discussed later in this chapter.

A citizens' advisory group was used by 20 (18.9%) of the declining districts and 13 (56.5%) of the closure districts. In closure districts

TABLE XIV
POLICY-MAKING DECISIONS REGARDING
THE USES OF EXCESS SPACE

Person or Group Involved in Process	Declining Districts		Closure Districts	
	Number	Percent	Number	Percent
Administrative Decision	52	49.1	20	87.0
Taskforce	8	7.5	7	30.4
Citizens' Advisory Group	20	18.9	13	56.5
Staff Input	29	27.4	14	60.9
Newsletters	9	8.5	8	34.8
Community Meetings	14	13.2	10	43.5
Opinion Surveys	4	3.8	4	17.4
Community Surveys	5	4.7	4	17.4
Other (Legal Counsel, Planning Commission)	1	0.9	0	0

Note: Totals do not equal 100% because of districts reporting more than one method.

those using a citizens' advisory group were less likely to have developed criteria for the closure of a school ($r = -.479$; $p = .020$) than were those without such a group.

Twenty-nine (27.4%) of the declining districts and 14 (60.9%) of the closure districts used staff input as part of the decision-making process. As with citizens' advisory groups, there was a negative correlation ($r = -.419$; $p = .047$) between staff input and the development of criteria for closing a school in districts which had closed schools.

The use of newsletters, newspaper articles, community meetings, opinion surveys, legal counsel, and planning commissions were listed by 47 (43.4%) of the declining districts to involve or inform the community. All of the closure districts used at least one of these.

Forty-nine of the superintendents of declining districts reported that, because the district had no excess space, none of these methods of community involvement had been used.

Future Space Problems

Superintendents were asked whether expected changes in enrollment during the next three years will create space problems for the district. As can be seen in Table XV, 21 (19.8%) of those from declining districts and nine (39.1%) of those from closure districts expected the district to undergo further changes.

Table XVI summarizes the type of space problems expected by these superintendents. In the declining districts, three superintendents (2.8%) expected an increase in enrollment within the next three years; another (0.9%) expected an increase great enough to cause a shortage of

TABLE XV
EXPECTED CHANGES IN ENROLLMENT

Response	<u>Declining Districts</u>		<u>Closure Districts</u>	
	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>
Yes, future enrollment changes are expected.	21	19.8	9	39.1
No, the enrollment has probably stabilized.	76	71.7	14	60.9
Data was missing on questionnaire.	9	8.4	0	0
Totals	106	99.9	23	100

TABLE XVI
EXPECTED SPACE PROBLEMS

Type of Problem	<u>Declining Districts</u>		<u>Closure Districts</u>	
	Number	Percent	Number	Percent
Space shortage	1	0.9	0	0
Enrollment increase	3	2.8	1	4.3
Changing enrollment pattern	1	0.9	0	0
Surplus space	10	9.4	5	21.7
More closures	2	1.9	2	8.7
Closing district	1	0.9	0	0
None specified	12	12.3	1	4.3
No problems	76	70.8	14	60.9
Totals	106	100	23	100

space. One superintendent (0.9%) foresaw a change in enrollment patterns within the district so that the district will have to be restructured to accommodate students where enrollment is increasing at one grade level and declining at another. Thirteen superintendents (12.2%) are expecting further enrollment declines resulting in additional surplus space; of these, two (1.9%) expect to be closing a building as a result of the decline. One of the superintendents who reported an expectation of further decline stated that a further decline would mean closing the district. Twelve superintendents (12.3%) reported that they expect enrollment changes to create space problems for the district, but they did not specify what these problems might be. Seventy-six superintendents (70.8%) did not foresee space problems within three years.

None of the superintendents in closure districts expected space shortages in the district within the next three years. One (4.3%) expected an increase in enrollment. None expected a change in enrollment patterns, that is, a shift in student population, causing space shortages at some grade levels and surplus at others or a shift in district residency so that some buildings have surplus space while others have a shortage of space. Five superintendents (21.7%) expected more surplus space, and an additional two (8.7%) expected to close more buildings. One (4.3%) expected problems but did not specify the type of problems expected. Fourteen (60.9%) did not expect space problems.

Reversion Clauses

Some deeds of school buildings, especially deeds of older properties or land that was donated to the school district, contain a

reversion clause which states that the property will revert to the donor or his or her heirs in the event that the property is no longer used for educational purposes or is sold. This type of clause could result in legal challenges should the district decide to close the building. Superintendents were asked whether such clauses exist in any of their district properties. Table XVII reflect their responses.

In 17 of the declining districts (16%) and in nine of the closure district (39.1%) there are reversion clauses in deeds of districts properties. An additional eight superintendents of declining districts (7.5%) and two superintendents of closure district (8.5%) reported that they did not know whether there were reversion clauses in deeds of their district properties.

No significant correlation was found between the presence of reversion clauses and the number of buildings closed in districts which had closed buildings since 1977.

Criteria for Closing Schools

Superintendents were asked about the criteria used in the decision to close a school. Some superintendents described the criteria; others sent a copy of the documents developed by their districts. The first category was labeled "no criteria". Decisions which were based on administrative decision alone or on such statements as: "It made sense." or "It was long overdue." were placed in this category.

The second category contained those districts which had developed criteria for the closing of a school, but the criteria could be applied

TABLE XVII
REVERSION CLAUSES

Reversion Clauses in District Deeds	Declining Districts		Closure Districts	
	Number	Percent	Number	Percent
Yes, there are reversion clauses in district deeds.	17	16.0	9	39.1
No, there are no reversion clauses in district deeds.	72	68.0	12	52.2
Don't know.	8	7.5	2	8.7
No response	9	8.5	0	0
Totals	106	100	23	100

only to the school under consideration for closure. As an example, a district which had an old building needing extensive repair to the heating system might decide to close that building and bus students to other buildings. In the event of the need to close other buildings, the criteria used for closure of the old building would not necessarily apply.

The third category, "limited but applicable to several schools", included those districts which stated criteria in terms such as these :

1. Enrollment
2. Condition of building
3. Location of building
4. Bus transportation

These factors would be evaluated in the event of a consideration of school closures. The criteria could be applied to several schools.

The fourth category, "extensive, applicable to several schools", characterized districts which had developed written documents, usually developed by a committee or advisory group. This type of criteria included the factors to be considered in the discussion of closure, specific activities to be carried out when a decision is made for closure including such additional aids as a guide for reassignment of students and staff, an enrollment impact statement, and transportation plans. The statement might also provide for alternate uses of space of criteria for the lease or sale of property. Table XVIII summarizes the responses of superintendents concerning criteria for the closure of schools.

TABLE XVIII
CRITERIA FOR CLOSURE

Category Label	<u>Declining Districts</u>		<u>Closure Districts</u>	
	Number	Percent	Number	Percent
No criteria	1	0.9	1	4.3
Limited to one school	15	14.2	11	47.8
Limited but applicable to several schools	5	4.7	5	21.7
Extensive	7	6.6	6	26.1
Don't know	1	0.9	0	0
No response	77	72.6	0	0
Totals	106	100	23	100

One superintendent of declining districts (0.9%) and one superintendent of closure districts (4.3%) reported criteria which was categorized as "No Criteria" in this report. Fifteen of the declining districts (14.2%) had developed criteria for closing a school limited to the one school under consideration. Eleven of the closure districts (47.8%) were in this category. Five districts in each sample (4.7% of the declining districts and 21.7% of the closure districts) had developed limited criteria which could be applied to several schools. Seven of the declining districts (6.6%) and six of the closure districts (26.1%) had developed extensive criteria for the closure of a school.

In closure districts, the larger districts were more likely to have developed an extensive criteria for closure ($r = .566$; $p = .005$). Those which had developed extensive criteria were less likely to have used excess space for government mandated programs or for district uses such as curriculum centers, music rooms, and such ($r = -.576$; $p = .004$ for government programs; $r = -.419$; $p = .047$ for district programs). Districts which had developed extensive criteria for closure were less likely to have involved a citizens' advisory group ($r = -.479$; $p = .020$) or staff input ($r = -.419$; $p = .047$).

For the closure districts there was a significant correlation ($r = .432$; $p = .040$) between the number of school closures with conflict and the development of criteria for closure. An examination of the level of opposition surrounding the 33 schools studied in the third sample, the closure districts, revealed no significant correlation between the development of extensive criteria and the level of opposition to a closure ($r = -.056$; $p = .445$). Table XIX summarizes the correlations

TABLE XIX
CORRELATION: CRITERIA FOR CLOSING A SCHOOL
WITH SEVEN OTHER VARIABLES

Variable	Correlation
<hr/>	
Size of district	r= .566 p= .005*
Use of space for government mandated programs	r= -.576 p= .004*
Space used for district programs	r= -.419 p= .047*
Involvement of citizens' advisory group	r= -.479 p= .020*
Involvement of staff input	r= -.419 p= .047*
Number of closures with conflict	r= .432 p= .040 *
Level of opposition to closures	r= -.056 p= .756

* significant correlation

between the development of criteria for closure and these other variables.

Building Closures

Superintendents were asked whether their districts had closed one or more school buildings in the years between 1970 and 1983. Twenty-eight (26.4%) had done so; 78 (73.5%) had not. Table XX summarizes the number of schools closed by each of these districts. As can be seen by a comparison of Tables XX and XXI, most of the districts which closed schools experienced some conflict over the closure of at least one school. Only eight (7.5%) of the declining districts and six (21.1%) of the closure districts experienced no conflict over school closures. Eleven (10.4%) of the declining districts and eight (34.8%) of the closure districts experienced conflict over the closure of one school. By contrast, one district (0.9% of declining districts, 4.3% of closure districts) had some degree of conflict over the closure of nine schools. Seventy-two schools were closed during this time period; some conflict was involved in the closure of 42 of these (58.3%). This section is concerned with the number of schools experiencing conflict. An examination of the levels of opposition to the closure of a school and the factors associated with the opposition is discussed later in this chapter.

Districts Which Closed Schools

An examination was made of the 33 last closed schools in the 23 districts which had closed schools during the years 1977 to 1983. Table

TABLE XX
NUMBER OF SCHOOL CLOSED
(1970-1983)

Number Closed	<u>Declining Districts</u>		<u>Closure Districts</u>	
	Number	Percent	Number	Percent
19	1	0.9	1	4.3
7	1	0.9	1	4.3
6	1	0.9	1	4.3
4	1	0.9	1	4.3
3	2	1.9	2	8.7
2	8	7.5	7	30.4
1	14	13.2	10	43.5
0	78	73.6	0	0
Totals	106	100	23	100
Summary Statistics	Mean = 2.9		Mean = 2.87	
	Median = 1.7		Median = 1.71	
	Number closed = 72		Number closed = 66	

TABLE XXI
CONFLICT CONCERNING CLOSURE OF A SCHOOL
(1970-1983)

Number of Conflicts With Closure	Declining Districts		Closure Districts	
	Number	Percent	Number	Percent
Conflict with 9 schools	1	0.9	1	4.3
Conflict with 6 schools	1	0.9	1	4.3
Conflict with 3 schools	2	1.9	2	8.7
Conflict with 2 schools	5	4.7	5	21.7
Conflict with 1 school	11	10.4	8	34.8
No conflict with closures	8	7.5	6	26.1
No schools closed	78	73.6	0	0
Totals	106	100	23	100
Summary Statistics	Mean number of closures with conflict = 2.1		Mean number of closures with conflict = 2.29	
	Median = 1.4		Median = 1.6	

XXII reports the year in which each school was closed. The closure of each school was examined and tabulated separately. Some districts will, therefore, have been tabulated more than once. The largest number of closures occurred in 1982; seventeen (51.5%) were closed in that year. The sequence of closures was examined. Table XXIII summarizes the place in which the particular school being considered was closed. Eleven of the schools (33.3%) were the only ones closed since 1970. One (3%) was the first closed; the district planned to close others in the future. Two (6.1%) had closed a school previous to the one under consideration. One (3%) was the fourth closed. Eighteen (54.5%) of the 33 schools examined in this study were closed at the same time as at least one other school in the district.

Time Involved in School Closure

Superintendents were asked the length of time which elapsed between the time that the administrative staff first realized that some major reorganization of building space was necessary and the time that a decision was made to close one of the buildings. Table XXIV summarizes their replies. Schools were fairly evenly divided in the amount of time between the first realization of the need to reorganize space and the decision to close a building. Approximately one-fourth of the schools fell into each category. Eight (24.2%) were in districts which spent less than six months in this process. Eight (24.2%) were in districts which spent between six and 12 months; another eight (24.2%) spent between 12 and 18 months in the process. The remaining nine (27.3%) were in districts which spent more than 18 months between the

TABLE XXII
YEAR OF CLOSURE OF LAST SCHOOL

Year Closed	Number of Schools	Percentage of Closures
1983	7	21.2
1982	17	51.5
1981	4	12.1
1980	2	6.1
1979	2	6.1
1978	1	3.0
Totals	33	100

TABLE XXIII
SEQUENCE OF CLOSURE

Sequence	Number of Schools	Percentage of Schools
One of several closed at same time	18	54.5
Fourth school closed	1	3.0
Second school closed	2	6.1
First school closed	1	3.0
Only school closed	11	33.3
Totals	33	100

TABLE XXIV
TIME BETWEEN RECOGNITION OF NEED
AND DECISION TO CLOSE

Time	Number of Schools	Percentage of Schools
Longer than 18 months	9	27.3
12 to 18 months	8	24.2
6 to 12 months	8	24.2
Less than 6 months	8	24.2
Totals	33	100

time when the administrative staff first realized that a decision might be made concerning the uses of disposition of building space and the decision to close a building.

Table XXV summarizes the amount of time which elapsed between the announcement of the decision to close the building and the actual closing of the building. Fourteen schools (42.4%) were closed less than six months after the announcement. Sixteen (48.5%) were closed between the sixth and the 12th month following the announcement. Three (9.1%) took longer than 18 months.

Tenure of the Superintendent

The length of time that the superintendent had been in office at the time of the decision to close the school was examined. As can be seen in Table XXVI, superintendents of districts where 79.8% of the schools were located had been in office five years or less at the time the decision was made to close the building. Four schools (12.1%) were in districts where the superintendent had been in office one year or less; in eight (24.2%) the superintendent had been in office for two years. Four schools (12%) were in districts where the superintendent had been in office for more than ten years. One (3%) had been superintendent of the district for 20 years.

The School Board

Of the 33 schools being studied, 16 were in districts with a five member board; the remaining 17 schools were in districts with a seven member board. The average time that these school board members had served at the time of the decision to close was considered. Table XXVII indicates these findings.

TABLE XXV
TIME BETWEEN ANNOUNCEMENT OF DECISION
AND CLOSING OF BUILDING

Time	Number of Schools	Percentage of Schools
Longer than 18 months	3	9.1
12 to 18 months	0	0
6 to 12 months	16	48.5
Less than 6 months	14	42.4
Totals	33	100

TABLE XXVI
TENURE OF SUPERINTENDENTS AT
TIME OF BUILDING CLOSURE

Tenure	Number of Schools	Percentage of Schools
Twenty years	1	3.0
Thirteen years	1	3.0
Twelve years	1	3.0
Ten years	1	3.0
Eight years	1	3.0
Six years	3	6.1
Five years	5	15.2
Four years	6	19.2
Three years	3	9.1
Two years	8	24.2
One year or less	4	12.1
Totals	33	100
Summary Statistics	Mean = 4.6 years	
	Median = 3.8 years	

In none of the school closures being examined had school board members averaged less than one year of service in the district. The majority (72.7%) were serving their first term in office. Another 21.2% were serving their second term. Only 6.1% had served more than two terms.

Policies Regarding the Closure of Schools

Superintendents were asked whether their district had a written policy or guidelines for the uses of excess space or for the closure of a school at the time the district identified the need to close a school. Eleven school (33.3%) were from districts which had such a written policy; 22 (66.6%) were not. Of the 11 which had a written policy, the policy was revised in four cases (36.3%) as a result of experiences associated with the closure. Of the 22 which had no policy, a policy was developed in eight (36.3%) as a result of the experience; 14 schools (42.4%) were in districts which did not have a written policy for the closure of schools or for the uses of space and did not develop one as a result of the experiences associated with closing the building. These findings are reflected in Table XXVIII.

Other Issues

Superintendents were asked whether there were other issues within the community which might conceivably harden any opposition to the closure of a school. Table XXIX indicates, in the majority of cases (87.9%) no other issues which might intensify opposition were present. Four superintendents (12%) reported the presence of such issues. They

TABLE XXVII
AVERAGE TENURE OF SCHOOL BOARD MEMBERS
AT TIME OF DECISION TO CLOSE

Tenure	Number of Schools	Percentage of Schools
More than 8 years	0	0
5-8 years	7	21.2
1-4 years	24	72.7
Less than one year	0	0
Totals	33	100

TABLE XXVIII
POLICIES REGARDING THE USES OF EXCESS SPACE
AND BUILDING CLOSURES

Closure Policy Status	Number of Schools	Percentage of Schools
Schools in district with no policy at time of closure	22	66.6
Schools in district with policy at time of closure	11	33.3
Policy developed as a result of experiences	8	
Policy revised as a result of experiences	4	

TABLE XXIX
ISSUES WHICH MIGHT INTENSIFY
OPPOSITION TO CLOSURE

Issue	Number of Schools	Percentage of Schools
Budget negotiations	1	3
Levy failure	1	3
Effort to reduce budget	1	3
Closure of new building	1	3
No other issues	29	88
Totals	33	100

listed these issues which contributed to the opposition: budget negotiations, levy failure, effort to reduce budget, and the fact that the building slated for closure was new. Twenty-nine (88%) reported that there were no other issues within the community complicating the closure of the school.

Description of Closed Schools

Tables XXX, XXXI, and XXXII describe the buildings which were closed. As Table XXX indicates, no high school closures were examined in this study. Four junior high buildings (12.1%) and one elementary school with grades 1-8 (3%) were examined. The remaining 28 schools (84.8%) were primary schools with no grades six, seven, or eight.

Table XXXI describes the quality of the buildings which were closed. Only seven (21.2%) of the buildings which were closed were reported to have need major renovation; another nine schools (27.2%) were reported to have been outdated for a good educational program. Nearly half of the schools (48.4%) were reported to have been in good condition, needing little or no modification to meet the educational needs of students.

The location of the building closed was summarized in Table XXXII. Four schools (12.1%) were too far from the students attending the school. Another 12 schools (36.3%) were located where busing was necessary because of conditions either around the school or between the school and the homes of the students. Nearly half of the schools (48.5%) were centrally located to students being served.

TABLE XXX
TYPE OF BUILDING CLOSED

Type of Building	Number	Percentage
High School	0	0
Junior High	4	12.1
Elementary (to grade 8)	1	3.0
Primary (no grades 6,7,8)	28	84.8
Totals	33	100

TABLE XXXI
QUALITY OF BUILDING CLOSED

Quality of Building	Number	Percentage
Good condition	16	48.4
Moderate condition	1	3.0
Needed major renovation	7	21.2
Outdated for a good program	9	27.2
Totals	33	100

TABLE XXXII
LOCATION OF BUILDING CLOSED

Location of Building	Number	Percentage
Centrally located to students served	16	48.5
Too far from students served	4	12.1
Busing necessary because of conditions between school and homes	12	36.3
Not given	1	3.0
Totals	33	100

Conflict Associated With School Closures

As was stated earlier in this chapter, 20 of the 28 districts (71.4%) which reported closing one or more schools during the 1970-83 school years reported conflict surrounding the closure of at least one of the schools. Some element of conflict was involved in the closure of 42 schools (58.3%) during this time period.

A more detailed study of conflict surrounding the closure of schools was undertaken for the 23 districts which had closed 33 schools since 1977. Correlations for the eight variables examined are found in Table XXXIII.

For these districts the percentage of decline was related to the number of conflicts over closure ($r = -.448$; $p = .032$). Districts which had a greater percentage of decline in enrollment experienced fewer cases of conflict in school closures. A significant negative correlation was found between the number of cases of conflict and reorganization within the district ($r = -.438$; $p = .036$). Districts which reorganized internally experienced fewer cases of conflict. Districts which had sold a building were likely to have experienced fewer cases of conflict ($r = -.489$; $p = .018$). The number of uses of excess space was significantly correlated to the number of cases of conflict ($r = .558$; $p = .006$). Districts which were finding more uses of space were experiencing more cases of conflict. Districts which sought legal advice or the help of a planning commission were likely to have experienced fewer cases of conflict ($r = -.758$; $p = .000$). Districts whose superintendent expected enrollment changes to cause problems within the next three years were likely to have had fewer cases of conflict over the closure of schools

TABLE XXXIII
CORRELATION: CONFLICT WITH EIGHT OTHER VARIABLES
1970-1983

Variable	Correlation	Level of Significance
Percentage of decline	-.448	.032*
Reorganization within district	-.438	.036*
Selling a building	-.489	.018*
Number of uses of excess space	.558	.006*
Legal counsel or planning commission	-.758	.000*
Expected enrollment changes	-.466	.025*
Criteria for closing	.488	.018*
Number of schools closed	.308	.152

since 1970. Districts which experienced a greater number of cases of conflict were more likely to have developed extensive criteria for closing ($r = .488$; $p = .018$). The number of schools closed by the district had no significant correlation with the number of cases of conflict ($r = .309$; $p = .152$).

Levels of Opposition

For this part of the study, the levels of opposition surrounding the closure of the 33 last closed schools were examined. These schools were dichotomized into groups based on the level of opposition associated with the closure. Table XXXIV summarizes the composition of these groups. As can be seen by the table, five schools (15.2%) received no opposition to their closure. Eight (24.2%) received some citizens' complaints, and another six (18.2%) received moderate opposition with no powerful groups joining the opposition. Twelve schools (36.4%) received strong opposition with limited group activity. Two (6.1%) were surrounded by intense opposition with organized group activity and community polarization. In determining the composition of the groups, those schools which received either strong or intense opposition were categorized as "major conflict" schools. Those receiving no opposition, some citizens' complaints, or moderate opposition were classified as "little conflict" schools.

The form of opposition to the closure was also examined. As can be seen in Table XXXV, the most common form of opposition to the closure of the 33 schools under consideration was the threat of secession from the parent district and the formation of a new district. In the closure of

TABLE XXXIV
COMPOSITION OF MAJOR CONFLICT
AND MINIMUM CONFLICT GROUPS

Level of Opposition	<u>Little Conflict</u>		<u>Major Conflict</u>	
	Number	Percent	Number	Percent
Intense opposition			2	6.1
Strong opposition			12	36.4
Moderate opposition	6	18.2		
Some citizen's complaints	8	24.2		
No opposition	5	15.2		
Totals	19	57.5	14	42.5

TABLE XXXV
FORMS OF OPPOSITION TO SCHOOL CLOSURES

Form of Opposition	Number of Schools	Percentage of Schools
Attempt by an organized group to force resignation of the superintendent	1	3.0
Effort by an organized group to recall members of the school board	2	6.1
Citizen(s) running for election to school board on a "Save Our Schools" (or similar) slogan	0	0
Defeat of school budget or levy or bond measure	4	12.1
Legal action to keep school open	4	12.1
Threat of secession from school district	10	30.3

10 of the 33 schools (30.9%) this threat was present. As can be seen in Table XXXVI, some districts faced more than one form of opposition. Three schools (9.1%) were surrounded by three forms of opposition. One school (3%) faced two forms, and 10 (30.3%) faced one of these forms of opposition. The remaining 19 schools (57.6%) did not experience any of the forms of opposition listed.

Correlations were then computed between the dichotomized levels of opposition and the other factors associated with the closure. Some significant correlations were found between the major conflict group and the other factors. (See Table XXXVII.) There was an inverse relationship between the level of opposition to the closure and the percentage of decline ($r = -.33$; $p = .058$). Districts which had a lower percentage of decline experienced greater opposition to the closure than did districts with a greater percentage of decline. A significant inverse relationship was found between the level of opposition and the average length of service of the board members ($r = -.348$; $p = .047$). Opposition to the closure was likely to have been more intense where members of the school board were relatively new in office. As their time of service increased, the level of opposition was likely to decrease.

One phenomenon which should be noted is that, although there were few significant correlations between the level of opposition to the closure and the methods which the district used to involve or inform the community in the decision, as the number of methods not including the task force increased, the level of significance also increased. Thus, there is a significant correlation ($r = .347$; $p = .047$) between the level of opposition and the number of methods of community involvement. As

TABLE XXXVI
NUMBER OF FORMS OF OPPOSITION

Number of Forms of Opposition	Number of Schools	Percentage of Schools
<hr/>		
3	3	9.1
2	1	3.0
1	10	30.3
0	19	57.6
<hr/>		
Totals	33	100
<hr/>		

TABLE XXXVII
CORRELATION: LEVEL OF OPPOSITION WITH VARIABLES
IN 33 LAST CLOSED SCHOOLS

Variable	Correlation	Level of Significance
Number of uses of space	.008	.997
Percentage of decline	-.333	.058
Task force	-.369	.035*
Citizens' advisory group	-.139	.440
Community meetings	-.570	.001*
Number of methods of involvement	.347	.047*
Expected enrollment changes	-.131	.465
Reversion clauses	.137	.445
Criteria for closure	-.056	.756
Number of schools closed	-.129	.473
Year of closure	.234	.190
Sequence of closure	-.168	.348
Time/decision to close	.251	.158
Time/announcement of closure	.187	.297
Tenure of superintendent	.309	.080
Number on school board	.219	.220
Written policy	.086	.631
Other issues	.130	.468
Type of building	.169	.350
Quality of building	.211	.238
Location of building	.155	.388
Tenure of school board	-.348	.047*
Financial result	-.056	.753

* significant correlation

the level of opposition increased, districts were likely to use more methods of involving or informing the community.

A significant negative correlation ($\underline{r} = -.570$; $\underline{p} = .001$) was found between community meetings as means of informing or involving the community and the level of opposition. Community meetings were usually found in conjunction with a task force ($\underline{r} = .457$; $\underline{p} = .007$). An inverse relationship exists between the level of opposition and the presence of a task force in the decision-making process ($\underline{r} = -.367$; $\underline{p} = .035$). A task force was involved in seven (30.4%) of the districts which closed schools since 1977. The correlations of level of opposition with 23 other variables as presented in Table XXXVII. An inverse correlation was found between the use of a task force and each of the forms of opposition used. Table XXXVIII shows these negative correlations.

Amlung (1980), Brody (1976, and Kloes (1982), suggested some factors which should be considered in closing a school. For this reason it is important to note the variables which were not found to be significantly correlated to the level of opposition to closure of 33 schools examined in this study. As shown in Table XXXVII, these include: the number of uses of space ($\underline{r} = .008$; $\underline{p} = .997$); expected enrollment changes ($\underline{r} = .137$; $\underline{p} = .445$); the presence of criteria for closure ($\underline{r} = -.056$; $\underline{p} = .756$); the number of schools closed ($\underline{r} = -.12$; $\underline{p} = .473$); the year of closure ($\underline{r} = .234$; $\underline{p} = .190$); the sequence of closure ($\underline{r} = 1.68$; $\underline{p} = .158$); the time between the announcement of the decision and the actual closure ($\underline{r} = 1.87$; $\underline{p} = .297$); the number of members of the school board ($\underline{r} = .219$; $\underline{p} = .22$); the presence of written policies ($\underline{r} = .086$; $\underline{p} = .631$); the presence of other issues which might contribute to opposition ($\underline{r} =$

TABLE XXXVIII
CORRELATION: PRESENCE OF TASK FORCE
WITH FORMS OF OPPOSITION

Form of opposition	Correlation	Level of Significance
<hr/>		
Level of opposition	-.367	.035*
Attempt to force resignation of superintendent	-.453	.008*
Attempt to recall members of school board	-.426	.013*
"Save Our Schools" or similar slogan	-.479	.005*
Defeat of budget or other money measure	-.503	.003*
Legal action	-.439	.010*
Threat of secession	-.448	.009*

* significant correlation

.130; $p = .468$); the type of building closed ($r = .169$; $p = .350$); the quality of the building ($r = .211$; $p = .238$); the location of the building, ($r = .155$; $p = .388$); the percentage of decline ($r = -.33$; $p = .058$); or the tenure of the superintendent ($r = .309$; $p = .080$). If the test of significance were set at the .10 level, the latter two factors would be significant.

The finding that the use of a task force was significantly correlated with a lesser degree of opposition to the closing of a school merits some further observations concerning the use of a task force. A task force was more likely to have been used in closures for which the total number of methods of community involvement was less ($r = .694$; $p = .000$). The task force was often used with newsletters ($r = .512$; $p = .002$) and the community meetings ($r = .457$; $p = .007$) to involve or inform the community. Districts which employed a task force in the closure were likely to have reorganized internally as a method of using excess space ($r = .337$; $p = .055$); sought legal counsel with closure ($r = .479$; $p = .005$) and involved a planning commission ($r = .479$; $p = .005$). Table XXXIX presents these findings concerning the use of a task force.

Financial Result of Closures

None of the 23 superintendents of closure districts reported that closing a building had cost the district money. The majority, 87.9%, reported a financial saving result from the closure. Another 12.1% stated that the closure had occurred so recently that they were unable to tell the financial result as yet. Table XL summarizes this information. No significant correlation was found between the level of opposition to the closure and the financial result ($r = .056$; $p = .753$).

TABLE XXXIX
 CORRELATION: USE OF A TASK FORCE
 AND SIX OTHER VARIABLES

Variable	Correlation	Significance
Number of methods of community involvement	.694	.000*
Newsletters	.512	.002*
Community meetings	.457	.007*
Internal reorganization	.337	.055
Legal counsel	.479	.005*
Planning commission	.479	.005*

* significant correlation

TABLE XL
FINANCIAL RESULT OF CLOSING A BUILDING

Response	Number of Schools	Percentage of Schools
Made no difference	0	0
Saved financially	29	87.9
Cost financially	0	0
Unable to tell as yet	4	12.4
Totals	33	100

CHAPTER V

SUMMARY, CONCLUSIONS, IMPLICATIONS, AND RECOMMENDATIONS FOR FURTHER STUDY

Summary

Introduction

The problem of what to do with a school building no longer needed by a school district is not a new one. Buildings designed for one educational purpose do not always fit a newer or a different one. In recent years, however, the problem of what to do with building space no longer needed for classrooms has become more acute as a sharp decline in the birthrate, localized migration in and between school districts, the flight of young, middle-class parents to suburbia's outer limits and beyond, the move to the sunbelt, and the growth of private and parochial schools have produced a national decline in public school enrollment. Although some demographers (Abramowitz, 1978; Robson et al., 1979; Wegmann, 1980) foresaw an end to the national decline in the birthrate, the problems associated with excess space are expected to continue as the forces which contribute to changes in enrollment continue. This study surveyed the status of the public school districts in Oregon with regard to growth or decline in enrollment and the uses and disposition of excess space resulting from decline. This was followed by a comparison of districts which had closed schools.

The Population

It was found that, of the 309 public school districts in Oregon, 126 had declined in enrollment during the time period being studied and thus were included in the study. A questionnaire was mailed to the superintendents of each of these districts requesting information concerning the uses and disposition of excess space. Of these, 106 returned the questionnaire, a return rate of 84.12%. From these 106 districts, a third sample was selected. This sample consisted of the 23 districts which had closed schools during the time period being studied. Because some districts had closed many schools, the last school closed was selected for examination. When the last closure involved more than one school, each school was examined separately. In all, 33 schools were examined in this part of the study.

Purpose of the Study

Basically, the study was designed to answer the following questions:

1. To what extent has a decline in enrollment necessitated some adjustment in the uses of building space?
2. How have public school districts used or disposed of this excess space?
3. What methods have district administrators used to involve or inform the community of decisions concerning the uses and disposition of excess space?
4. What problems do administrators foresee as a result of enrollment changes within the next three years?

5. To what extent has reorganization taken place in districts which have declined in enrollment?
6. To what extent have reversion clauses been written into deeds of properties in districts which are declining in enrollment?
7. How many schools have these districts closed during the time period being studied?
8. With how many of these did the district experience conflict?
9. What criteria were employed in the decision to close a school?

A second part of the study focused on the level of opposition surrounding the closure of a school. A list of variables which might conceivably be related to conflict were compared for each of the 33 schools in the study.

Methodology

Information from the questionnaire was presented in a frequency distribution with percentages given where this was appropriate. To explore the issues which might be factors in the conflict surrounding the closure of a school, the 33 last closed schools in the 23 districts which had closed schools since 1977 were examined in detail. A correlational process was used to determine the relationships between the level of opposition to the closure and factors which might contribute to the conflict.

Results

The Extent of the Decline. It was found that, of the 309 public school districts in Oregon, 126 had declined in enrollment during the time period being studied. Of these 126 districts, 106 (84.12%)

returned the questionnaire which was mailed to them. Fifty-seven districts (53.7%) had declined in enrollment enough to necessitate some adjustment in the ways in which space was used. Twenty-three districts had closed schools during the years 1977-83.

The Uses of Excess Space. Many school districts made more than one use of the excess space resulting from the decline in enrollment. The most common usage was for housing other district programs such as curriculum centers or music rooms. Sixty percent of the districts with a decline in enrollment reported this use of excess space. Another 54% of the districts with a decline in enrollment had used space to house government mandated programs. Some 46% of the districts had used space for storage, and 42% had unused space. Each of the categories listed on the questionnaire was used by some of the districts.

Methods Used to Involve or Inform the Community. Although the school board is responsible for making the final decision regarding the uses and disposition of excess space, all of the districts reported using some method of involving others in the decision-making process. Administrative decision was the most commonly reported; 16.6% relied on administrative decision alone. Others used administrative decisions in conjunction with citizens' advisory groups, a task force, newsletters, or newspaper articles. A significant negative correlation ($r = -.367$; $p = .035$) was found between the presence of a task force and the level of opposition to the closure.

Future Space Problems. Twenty percent of the superintendents of declining districts and 39% of those in closure districts expected

further enrollment changes within the next three years. In the declining districts two (2.8%) expected an increase in enrollment; one (0.9%) expected the increase to be great enough to cause a shortage of space. One (0.9%) of the districts expected a change in enrollment patterns, resulting in the district having to be restructured to accommodate students at different grade levels. Further enrollment declines are anticipated by 12.2% of the superintendents; 1.9% of these expect to close a building or buildings because of the decline. No space problems were foreseen within the next three years by 70.8% of the superintendents.

Reorganization of Districts. Of the 106 districts with a decline in enrollment, only four had been reorganized with another district during the time period being studied (1970-83). An examination of the characteristics of these districts revealed that in each case smaller districts had merged to form a larger district or had joined a larger district. Because of the homogeneous nature of these districts, it seems reasonable to assume that reorganization of the district with another district is one method of coping with decline when the district is too small to consider closing schools.

Reorganization within the district was used by 20.8% of declining districts.

Reversion Clauses. Seventeen superintendents (16%) in declining districts and nine (39.1%) in closure districts reported that there are reversion clauses in deeds of district properties. In addition to these, eight superintendents (8.5%) of declining districts and two (8%) of closure districts reported that they did not know whether there were

reversion clauses in deeds. No significant correlations were found between the presence of reversion clauses and the number of buildings closed or targeted for closure in districts which had closed schools since 1977.

School Closures. Of the 106 districts in the study, 28 had closed one or more schools since 1970; 78 had not closed schools during this time. These 28 districts had closed 72 schools during this time. Six of these schools were closed prior to 1977; the other 66 schools were closed between 1977 and 1983.

Districts which closed schools during the time period between 1977 and 1983 were examined in detail. Twenty-three districts and the last closed schools in each district were examined in this part of the study. These 33 last closed schools were the basis of the examination of conflict surrounding school closures.

Opposition to School Closures. To explore the issues which might be factors in the conflict which surrounded the closure of a school, the 33 last closed schools were divided into two categories. Those schools which superintendents indicated had experienced either strong or intense opposition to the closure were labeled "major conflict" districts. Those whose superintendents indicated either no conflict, some citizen's complaints, or moderate opposition were categorized as "little conflict" districts. A correlational process was used to determine the relationship between the level of opposition and factors which might contribute to the conflict. A significant correlation was found between the level of opposition to the closing of a school and several of the variables examined. An inverse relationship ($r = -.369$;

$p = .035$) was found between the level of opposition and the presence of a task force involved in decisions concerning the uses and disposition of excess space. No significant correlation was found between the level of opposition to the closure and the presence of a citizens' advisory group.

An inverse relationship was found between the level of opposition and the average length of time that school board members had served ($r = -.348$; $p = .047$); that is, the shorter the average length of service, the greater the likelihood of higher levels of opposition surrounding school closures. A non-significant correlation ($r = .309$; $p = .080$) was found between the length of service of the superintendent and the level of opposition.

An inverse but non-significant relationship was found to exist between the level of opposition and the percentage of decline ($r = -.333$; $p = .058$). Greater opposition to the closure may occur in districts which have experienced a lesser decline; conflict may diminish as the decline increases.

Opposition to the closure of a school had no significant correlation ($r = -.056$; $p = .753$) to the financial result of the closure. Of the 33 schools examined in the study, superintendents reported that in 29 cases the closure had saved the district money; the remaining four schools had been closed so recently that superintendents were unable to assess the financial results as yet.

These factors distinguish between the major conflict and the little conflict groups: community meetings, a task force, and the average length of service of the school board. Using a .10 alpha level,

two additional factors emerge: the percentage of decline and the tenure of the superintendent.

The forms of opposition to the closure of a school are worth noting. The most commonly found form of opposition, that of secession from the school district, affected nearly a third of the last closed schools examined in the study.

Criteria and Policies for Closure. Some superintendents described the criteria used in the decision to close a school; others sent a copy of the documents developed by their districts. These were examined and classified into four categories: (1) No criteria, (2) Limited criteria, applicable to one school, (3) Limited but applicable to several schools and (4) Extensive, applicable to several schools. About half (47.8%) of the 23 districts which had closed schools during the time period being studied had developed criteria which was applicable to the one school being considered for closure. About one-fourth (26.1%) had developed extensive criteria applicable to several schools. No significant correlation was found between the development of criteria for closure and the level of opposition to the closure in the districts which had closed a school.

Financial Results of Closure. Unlike the Skiera (1979) findings, none of the superintendents in this study reported a financial loss from the closure of a school. In 87.9% of the cases, there was a financial saving; the level of opposition had no significant relationship with this. The other 12.4% of the schools had been closed so recently that the financial result was not yet known.

Conclusions

Guidelines for Closing a School

The findings of the present study indicate the appropriateness of offering the following recommendations for superintendents who are considering alternate uses of space or the closure of a school because of a decline in enrollment in the district.

The finding of a significant negative correlation between the use of a task force and the level of opposition associated with the closure of a school supports the recommendations of Brody (1976), Eisenberger (1978), and Frederickson (1981) that a task force be used when a school closure is being considered. The negative correlation between opposition and the use of community meetings supports the position that community meetings provide an avenue for helping to obtain community acceptance of the need for a school closure. If community meetings are used in conjunction with a task force to provide a forum for the task force to apprise the community of its findings and to advise the community of the rationale of its findings, the effectiveness of both may be enhanced.

Although no significant correlation was found between the time involved in the closure of a school and the level of opposition to the closure, it seems reasonable to assume that the task force should have sufficient time to gather data and assemble it for presentation to the public.

The statistically significant negative correlation between the tenure of the school board and the level of opposition to a school closure suggests that a relatively newer school board may have greater dif-

ficulty in convincing the public that a school closure is necessary. It seems reasonable, therefore, to emphasize the importance of developing the confidence of the community wherever possible. It is possible that, as Kloes (Note 3) and Moriat (1980) suggested, frequent press releases, school meetings, or citizen advisory groups may help to develop such confidence.

Based on the survey of the literature, I would also offer these recommendations. Know the community well (Kloes, Note 3). What works well in one community may not work in another.

Some of the districts in this study have not identified reversion clauses or other restrictions in deeds of district properties. Since these are likely to restrict the uses or disposition of space, it is well for superintendents to be aware of any such clauses and to plan for the uses or disposition of space with these in mind.

The findings in this study that most districts tried to find alternate uses of space before closing a school is supported by the literature (Frederickson, 1978; Gordon and Hughes, 1980; and Hechinger, 1980) that alternate uses of space are more acceptable to the community than is the closing of a school.

Although this study did not find a significant correlation between the presence of written policies and the level of opposition to a school closure, the literature (Land Use Board of Appeals, Note 9) suggests that, in the event of a legal challenge, the presence of written policies and criteria for the uses and disposition of space may provide documentation of community awareness of criteria for closure and of lack of arbitrary intent on the part of a school board.

Recommendations for Further Study

The prognosis of further decline in enrollment in some districts and the percentage of districts with unused space at the present time strongly suggest that the problems associated with declining enrollment will continue into the foreseeable future. For these reasons a continuing examination of the problems associated with declining enrollment seems necessary.

The present study was limited to the constraints of a mailed questionnaire. When the questionnaire was field tested, a major recommendation of all examiners was that the document should be condensed. This was done in order to insure a high rate of response. Now that the initial survey has been completed, some of the variables examined in this research lend themselves to further study.

First, the significant correlation between the task force and the level of opposition associated with the closure of a school suggests the importance of investigating the role of a task force in greater detail. Such factors as the composition of the task force, its responsibility and length of service, the person (or persons) to whom the task force reported, to whom members were responsible, and whether the recommendations of the task force were followed should be studied. How information gathered by the task force as disseminated to the public should also be investigated.

Second, the significant correlation between the average length of service of school board members and the level of opposition to the closure of a school poses some questions which should be investigated. Issues related to the tenure of school board members might include:

1. Did the prevalence of newer board members suggest instability in the district so that board members were voted in and out of office more frequently in districts which had greater opposition to a school closure?
2. Was the problem one of a lack of confidence on the part of the public, because the board members were relatively little known?
3. Were there any public displays of disagreement among members of the board?
4. What was the relationship between the superintendent and the school board?

Third, the effectiveness of the superintendent was beyond the scope of this study but could have some bearing on the level of opposition to a school closure. An on-site investigation of the number of items presented for board action by the superintendent and the rate of acceptance or rejection by the board would be in order. Also, the results of this study suggest that the length of service of the superintendent in the district may be worthy of further attention.

Fourth, an investigation into the make up of leadership of the opposition seems to be in order.

Last, a replication of the part of the study related to school closures is in order. If the findings of this study were substantiated by a study using a larger sample, the impact on the ways in which districts prepare for the closure of a school could be substantial.

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APPENDIX A

DECLINING ENROLLMENT: THE USES OF EXCESS SPACE

SECTION A

1. State Department of Education enrollment figures indicate that your district has experienced a decline in student enrollment during the years 1970-1982. Has this decline in the number of students resulted in some adjustment in the ways in which building space is used?

_____ Yes

_____ No

If yes, how has your district used this building space? Check as many as are applicable.

_____ District has been reorganized so that the number of students per building is more evenly divided. For example: Adding a sixth grade to a junior high building, changing from a K-8, 9-12 organizational structure to a K-5, 6-8, 9-12, etc.

_____ Excess space has been used for classrooms so that the number of students per class is reduced.

_____ Space has been used to house other programs mandated by local, state, or federal government.

_____ Space has been used to house other programs decided upon by the local district as a part of the school program. (Music room, curriculum center, etc.)

_____ Space has been used to house support services for the district. (Administrative offices, facilities for processing library books, etc.)

_____ Space has been used to accommodate a community program. (Senior Center, training space for adults, child care center, etc.)
Please specify. _____

_____ Space has been leased to some other agency.
Please specify. _____

_____ Space has been sold to some other agency.
Please specify. _____

_____ Building(s) or part of a building has been torn down to make way for something new.
Please specify. _____

_____ Space has been used for storage.

_____ Space is unused at the present time. 143

_____ Space is being held in anticipation of possible future growth in the district.

_____ Some other use. Please specify. _____

2. Did your district involve any of the following in the decision-making process leading to its use (or policy for use) of excess space? Check as many as are applicable.

_____ Administrative decision

_____ Taskforce

_____ Citizen's Advisory Group

_____ Staff input

_____ Newsletters to community

_____ Newspaper articles

_____ Community meetings

_____ Opinion surveys

_____ Community survey

_____ Other. Please specify. _____

3. Will an expected change in enrollment during the next three years create space problems for your district? For example, will the reduction in the number of students create surplus classrooms or surplus building space?

_____ Yes

_____ No

If yes, what type of space problems? _____

4. During the years 1970 to 1982 has your district, or part of your district, been reorganized with another district? (Absorbed into another district, merged with another district, etc.)

_____ Yes

_____ No

5. Are there reversion clauses written into any of the deeds of district properties which might elicit legal challenges if your district were to decide to use any of these properties for other than educational purposes?

_____ Yes

_____ No

If yes, please explain or supply a copy of pertinent language of the contract.

SECTION B

1. During the years 1970-1982, did your district decide to close one or more school buildings?

_____ Yes

_____ No

2. If yes, how many buildings were targeted for closure? _____

3. How many buildings were actually closed? _____

4. With how many of these did the district experience community conflict?

5. What criteria were employed in the decision to close the school? (If these criteria were written, please supply a copy if this would be more convenient.)

SECTION C

Note: Please fill out this section for the last school closed or in the process of closure since 1977. If your district has no schools closed or in the process of closure during this time period but has targeted one for closure, please fill out this section for that school. If your district has not closed any schools or targeted any for closure, you need not fill out this section.

1. In what year did this closure (or targeting for closure) occur? _____
2. Where in the sequence of school closures did this closure (or decision to close) occur?
 - _____ Only one building has been targeted for closure.
 - _____ This was the first of several targeted for closure.
 - _____ This was the second.
 - _____ This was the third.
 - _____ Several buildings were targeted for closure during this same year. (Please also indicate where in the sequence this occurred: first, second, etc.)
 - _____ Some other position. Which? _____
3. How much time elapsed between the time that the administrative staff first realized that some major reorganization of building space was necessary and the time that a decision was made to close one or more buildings?
 - _____ Less than 6 months
 - _____ 6-12 months
 - _____ 12-18 months
 - _____ 18 months or more. Indicate number of months. _____
4. How much time elapsed between the time that an announcement was made that a building would be closed and the actual closing of a building?
 - _____ Less than 6 months
 - _____ 6-12 months
 - _____ 12-18 months
 - _____ 18 months or more. Indicate number of months. _____

5. How long had the superintendent of your district held his/her position as superintendent of schools at the time of the decision to close this (or these) school(s)?

6. How many members did your school board have? _____

7. How long had the majority of members of the school board served at the time of the decision to close the school?

_____ Less than one year

_____ 1-4 years

_____ 5-8 years

_____ More than 8 years

8. Did your district have a written policy or guidelines for the uses of excess space or for the closure of a building at the time you identified the need to close a building?

_____ Yes

_____ No

9. If you answered yes to question 8, was the policy or guideline revised as a result of these experiences?

_____ Yes

_____ No

10. If you answered no to question 8, did your district develop a written policy or guideline as a result of these experiences?

_____ Yes

_____ No

11. At the time of the decision to close the school(s), were there any other issues within the community which might conceivably harden any opposition to the closure of a school?

_____ Yes

_____ No

If yes, what were these? _____

SECTION D

Note: Please fill out this section for the last school closed or in the process of closure in your district since 1977. If your district closed several schools at the same time, please fill out one section for each school. (For example, if the last closure in your district occurred in 1981, and at that time your district closed five schools, please fill out one section for each of these five schools.)

If your district did not close any schools but did target a school for closure during this time period, please fill out this section for that school.

1. Name of building _____
2. What type of building was this?
 - _____ Elementary. Grade levels? _____
 - _____ Junior High or Middle School. Grade levels? _____
 - _____ High School. Grade levels? _____
3. Was this building closed, targeted for closure, or in the process of closure?

4. Date (year) of the closure or targeting for closure, if not closed.

5. Circle the number of the phrase which best describes the level of opposition associated with the decision to close the school.

1	2	3	4	5
no	some	moderate	strong	intensive
opposition	citizen	opposition	opposition	opposition
	complaints	(no	(limited	(extensive
		powerful	organized	organized
		groups)	group	group
			activity)	activity
				and
				community
				polarization)
6. Check any of the following forms of opposition that apply to the closure of the school under consideration.
 - _____ Attempt by an organized group to force the resignation of the superintendent.
 - _____ Effort by an organized group to recall member(s) of the school board.

- ☐ Citizen(s) running for election to school board on a "Save Our Schools" (or similar) slogan.
☐ Defeat of school budget or levy or bond measure.
☐ Legal action to keep school open.
☐ Threat of secession from school district.
☐ Other. Please explain. _____
7. How would you describe the quality of the building?
- ☐ In good condition. Could meet educational needs with little or no modification.
☐ Structurally sound but outdated for a good educational program.
☐ Needed major renovation.
☐ Other. Explain. _____
8. How would you describe the location of the building?
- ☐ Centrally located to students served.
☐ Too far from students served.
☐ Conditions around the school or between the school and the homes of students made bus service necessary.
☐ Other. Please explain. _____
9. How has closing the school affected the district financially?
- ☐ It has made no difference financially.
☐ It has saved the district money.
☐ It has cost the district financially. How? _____

☐ We are unable to tell as yet.

If your district has closed other schools at the same time as this school, please use the supplementary forms provided.

Please use an additional sheet to add any other information or comments which might be pertinent to this study. Include any policy statements or documents concerning the uses of excess space or building closures which your district has developed. Thank you for taking part in this survey.

APPENDIX B

OASE

Oregon Association of School Executives

710 12th STREET S.E. / SALEM, OREGON 97301
TELEPHONE (503) 581-3141

February, 1983

Dear Superintendent:

Many of Oregon's public school districts have excess building space as a result of declining enrollment. Ms. Marjorie Brothers is conducting a study of the problems associated with this phenomenon.

The Oregon Association of School Executives' Executive Committee examined her proposal and believes that the results of her study will be useful to the school districts which are now facing or will be facing the problems associated with excess building space. In addition, the study will provide a much needed comprehensive description for the state of the extent of and problems associated with excess building space and school closure.

We encourage your fullest cooperation in this study.

Sincerely,

R. L. Ozzie Rose
Executive Director

RLR:bc

APPENDIX C

March 1, 1983

PORTLAND
STATE
UNIVERSITY
P.O. BOX 751
PORTLAND, OREGON
97207
503 229-4621

School of
Education

Dear Superintendent:

A study of the uses of excess space by public school districts in Oregon which have experienced declining enrollment during the past ten years, as well as the process used and problems encountered in school closures, is being conducted by Majorie Brothers, a student in the Portland State University and University of Oregon joint doctoral program in educational administration. Data provided by the Oregon Department of Education was used in identifying districts which have declined in enrollment. Comments made to the investigator by administrators during field testing of the questionnaire indicate that the results of the study would of value to the districts as they plan for the remaining years of this decade.

The design of the study and the enclosed questionnaire were developed and the latter field tested under the close supervision and consultation of her dissertation committee (Drs. George Timmons, Ronald Petrie, Leonard Robertson, and Loyde Hales, of Portland State University, and Dr. Philip Piele of the University of Oregon).

For the results of this study to be of optimal value, it is necessary that a high questionnaire rate be obtained. The experiences and actions of your school district in relation to the problems created by declining enrollment provide a wealth of information, the analysis of which, in conjunction with data from similar districts, will be useful to school districts throughout Oregon. Therefore, your cooperation in this study is greatly appreciated. Thank you.

Sincerely yours,

Loyde W. Hales
Chairman, Dissertation Committee

enclosure

APPENDIX D

March 1, 1983

Dear Superintendent:

The questionnaire included with this letter is part of a doctoral dissertation study into the problems associated with declining enrollment and school closures in the public school districts of Oregon. A preliminary examination of Oregon State Department of Education enrollment figures indicates that your district might be able to supply information of value to this study. I greatly appreciate your cooperation in completing the questionnaire and returning it in the enclosed envelope.

In some districts part of the information requested may not be available. Please answer the parts that do pertain to your district. If any question is unclear to you, please answer it according to your interpretation and include an explanation of this in the margin of the questionnaire.

If your district has developed any written policies, guidelines, survey questions, or other documents pertaining to enrollment decline and the uses or disposition of excess space, I would appreciate receiving a copy of these. If you would like to receive a copy of the results of this survey, please indicate this, and I will send a copy to you.

Needless to say, all information generated by this study will be treated as confidential. The name of the district and of the person supplying the data will not be identified.

As a doctoral candidate in the Portland State University and University of Oregon cooperative program, I appreciate your help in this study. Most important, however, I believe that the results of this study will be of use to the chief executives of Oregon's public school districts.

Thank you.

Yours truly,

A handwritten signature in cursive script that reads "Marjorie Brothers".

Marjorie Brothers

APPENDIX E

April 4, 1983

Dear Superintendent:

In March I mailed a questionnaire concerning enrollment decline and school closures to your district. Thinking that this may have been lost, I am sending another one to you. Whether or not the enrollment decline has been significant enough to necessitate any changes in your district, the information which your district can supply will be of value to the survey. I would greatly appreciate your completing and returning this in the enclosed envelope.

If your district has developed any written policies, guidelines, survey questions, or other documents pertaining to enrollment decline and the uses or disposition of excess space, I would appreciate receiving a copy of these. If you would like to receive a copy of the results of this survey, please indicate this, and I will send a copy to you.

Needless to say, all information generated by this study will be treated as confidential. The name of the district and of the person supplying the data will not be identified.

If part of the information requested is not available or does not apply to your district, please respond only to those parts which do apply. If any question is unclear to you, please answer it according to your interpretation and include an explanation of this in the margin.

As a doctoral candidate in the Portland State University and University of Oregon cooperative program, I appreciate your help in this study. Most important, however, I believe that the results of this study will be of use to the chief executives of Oregon's public school districts.

Thank you.

Yours truly,

Marjorie Brothers

Marjorie Brothers