

LOCAL SCHOOL UNITS PROJECT

Principles and Procedures in
the Organization of Satisfactory
Local School Units

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Foreword

It is generally recognized that the organization of satisfactory schools, attendance areas, and local units of school administration involves a careful study of existing educational conditions. If satisfactory functioning of units proposed is to be assured, the study must consider functions of schools and local school units, services now rendered and those to be rendered, relationships of governmental units responsible for providing educational opportunities, and financial support for schools.

This publication suggests principles and procedures and presents forms for collecting and tabulating data, maps, and charts which may be used in making a study of local school unit organization. It constitutes a revision and elaboration of the *Handbook of Procedures for Planning the Reorganization of Local School Units*, Circular No. 156 of the United States Department of the Interior, Office of Education, issued in January 1936.

Although steps and procedures have been treated in the order in which they might be expected to appear in a study, it is recognized that these are not necessarily encountered or completed in any definite order. Often several steps must be begun or be under way during the same general period of time.

It is hoped that this publication may be of help to State departments of education in their efforts to improve local school organization and administration; to county, city, and district superintendents of schools in their attempts to study intensively their own organizations; and to faculty members of colleges of education, normal schools, and teachers colleges, who may wish to use it in education courses relating to school administration and who may be called upon to serve as advisors in study programs.

BESS GOODYKOONTZ,
Assistant Commissioner of Education.

Planning a Study of Local School Units

PROBLEMS ORIGINATING FROM PRESENT ORGANIZATION

DURING RECENT years most States have found themselves face to face with troublesome facts and conditions relating to the organization of local school units. These may be stated as follows:

(1) To the extent that schools, attendance areas, and local administrative or fiscal units are too small or are inadequate in other respects, all phases of the school program of a State are likely to be handicapped, with the result that a well-rounded educational program will be practically impossible of attainment either in localities or in the State as a whole.

(2) Under existing organizations of local units many improvements in the instructional program can be effected only with maximum effort and often at excessive cost.

(3) Educators and laymen are increasingly insisting that money devoted to school purposes be expended efficiently; that is, that a maximum of educational returns be attained for the amounts expended.

(4) States are finding it increasingly necessary to state educational objectives in terms of a complete program of education, including the organization of adequate local school units. This realization calls for definite plans for continuing and effective studies of the problems involved in the administration of the educational program.

RECOGNITION OF THE NEED FOR REORGANIZATION

Although the organization of local school units is much more satisfactory in some States than in others, it may be said that in no State is the present organization adequate in every respect. Findings and recommendations of many State and other extensive surveys have directed attention to the desirability and necessity for larger units of local school administration. The fact that a desire was expressed in 1935 by officials in 32 States to participate in a study of local school unit organization to be conducted by the Office of Education indicates the great extent of the problem at that time. Some of these States had already undertaken, in limited areas, studies looking toward improvement in organization. Funds granted under the provisions of the Emergency Relief Appropriation Act of 1935 made possible State-wide studies of local school units in Arizona, Arkansas, California, Illinois, Kentucky, North Carolina, Ohio, Oklahoma, Pennsylvania, and Tennessee. Results of the findings of these studies are

reported in the publication of this Office entitled *Local School Unit Organization in 10 States*.

Similar studies made possible by grants from Works Progress Administration in the respective States have been carried on in Colorado, Idaho, Texas, Utah, Wisconsin, and Washington. Several States have included a study of local school unit organization as an integral part of their regular State programs with the idea that more time would be available not only for making the studies but for putting into effect the findings. On this basis Alabama has completed comprehensive studies in all except a few counties. During the past year New York has made a comprehensive study of school district organization as one of the major phases of the Regent's Inquiry into the Cost and Character of Education.

It is reasonably certain that in the future States will find it necessary, in the administration of their programs of education, to consider seriously problems arising from the inadequacies of existing organizations and to undertake systematically programs of planning more satisfactory local school units.

WHY INADEQUATE UNITS HAVE CONTINUED TO EXIST

Most of the existing local school units that are found to be unsatisfactory do not have the resources—that is, they have neither sufficient wealth nor enough pupils to constitute an economic unit—to provide at a reasonable cost services that are expected of them. There are a number of factors contributing to the existence of unsatisfactory units in practically all sections of the country. Some can readily be traced to the origin of schools and to the development of attendance areas and administrative and fiscal units, some to the provisions of existing laws, and some to such limitations as topographical conditions.

Many schools now in existence were established before the days of good roads and other modern transportation facilities. It was customary to locate the school in the community within walking distance of most of the children. Any effort to discontinue such schools or to change the boundaries of the areas served by them has been met with opposition, mainly perhaps because of sentiment and because of the fear of losing immediate local control over schools. Even though evidence shows the desirability for relocating schools and for changing boundaries of the respective school attendance areas, or even of the local administrative unit, general experience shows that local school officials are often inclined to oppose such changes because of the loss of certain powers and often quite limited duties exercised by them.

The fact that boundaries of many existing local administrative units coincide with those of political units has added to the difficulty of making changes in such boundaries. Changes in the organization of local school units have been encouraged and perhaps too often have actually been

effected when in reality such changes did not constitute improvement. In nearly every State there have been some unwise consolidations of schools, some school attendance areas and local administrative units established because of political expediency, some poorly planned and perhaps even dangerous transportation routes established, and other similar changes that now tend to thwart desirable reorganization.

Laws have often provided for political subdivisions to serve either as fiscal units for schools or as school administrative units or both. This condition generally proves to be a discouraging factor in efforts to improve the organization of local school units. When efforts are put forth to consolidate existing school administrative units or to enlarge a given unit by annexation of all or parts of adjoining units, legal provisions may set forth definite but cumbersome procedures. For example, a provision calling for a majority vote in the respective areas instead of the entire area involved often reduces the possibilities, as well as the probabilities, of effecting desirable changes. Sometimes the legal requirement that bonded indebtedness of existing districts be assumed by the proposed or newly created district is a serious handicap in a program of organizing satisfactory local school units. Because districts with small or no bonded indebtedness are reluctant to assume such obligations of adjoining districts, desirable organizations are consequently postponed. The probability of desirable changes is still further reduced when laws have permitted districts to bond themselves excessively. Even after it may become a part of a newly created local administrative unit, the district with such excessive indebtedness often is required to continue a tax levy for sinking fund purposes to liquidate its existing bonded debt. Present debt requirements of the newly formed unit, when added to the existing debt of the district in question, may prove to be an excessive tax burden, which itself is a handicap to reorganization.

When local tax levies legally ordered to relieve distressed districts are conducted for a number of years they, in effect, tend to subsidize inefficient districts and consequently to encourage their continuance. Sometimes the systems of apportioning State funds, as provided for by constitutional and legal prescriptions, tend to perpetuate inefficient local school units. Often, existing laws fail to recognize peculiar conditions relating to topography, density of population, etc. Failure on the part of laws to provide for the improvement in the organization of local school units as an integral part of the total State program certainly is a factor contributing to the continued existence of inadequate local units. Experience in States points rather definitely to the need for establishing criteria by regulatory power, authorized by law, for the formation of more satisfactory schools, attendance areas, and local administrative and fiscal units. It would seem wise for laws to require that needed changes be determined only after careful study of existing situations.

EXPLANATION OF TERMS

Local school units.—The term "local school units" is a general term which has come into relatively common usage during recent years, and should properly be used to designate the three types defined below, but should not be substituted for the specific terms needed for identifying and differentiating them.

The three types of local school units are attendance areas, administrative units, and fiscal units. The functions of each of these are distinct and yet essential for a complete program of education. These three types of units may or may not be coterminous. In States or areas in which they are coterminous, there has sometimes arisen a tendency to consider them as identical. The distinction in types of units should always be kept clearly in mind so that each may be considered and studied in its proper relationship to the other two.

School attendance area.—A school attendance area is "That geographic subdivision of an administrative unit which is served by a school."¹ An attendance area does not necessarily constitute a local taxing unit, and does not necessarily have an independent system of administration.

Attendance areas for elementary schools may or may not be coterminous with attendance areas for secondary schools. Oftentimes, boundaries of attendance areas, except as they coincide with boundaries of administrative or fiscal units, are indefinite and vaguely defined.

A school is "A group of pupils organized as one unit under one or more teachers to give instruction of a defined type."¹ A school, therefore, is either an elementary or a secondary school serving, respectively, an elementary or a secondary attendance area.

The place at which one or more schools are located is called a school center. A school center may, therefore, be an elementary school center, a secondary school center, or a center at which both an elementary and a secondary school are located.

Local school administrative unit.—A local school administrative unit is "That geographic unit comprising all the area under a single system of school administration."¹ The school or schools in a local school administrative unit are controlled by a board of education of which the executive official is usually the superintendent of schools. It generally constitutes a local taxing or fiscal unit. (One-teacher and other small school districts, serving as administrative units, generally have no local principal or superintendent.)

An administrative unit may include only one elementary school or one elementary and one secondary school attendance area, but it often includes several attendance areas (elementary and secondary).

Local school administrative units vary greatly in the extent or degree to which they exercise responsibilities delegated by the State. In some States certain powers and responsibilities are delegated to a relatively large unit, such as the county, serving as an intermediate unit. This unit acts as the

¹ Definition of National Advisory Committee on School Record and Report Forms.

agent of the State in dealing with dependent basic units and as the representative of these units in dealing with the State. Subdivisions of the State, serving primarily as intermediate units, may also serve as basic units in that they directly administer schools. In most cases, however, the State delegates the powers and responsibilities for organizing and administering schools to subdivisions of the intermediate (larger) unit. These subdivisions (smaller units or districts) thus serve as basic units for local administration of schools.

Local school fiscal unit.—The local school fiscal unit is "That geographic area which serves as the unit for local school support."¹ It is the unit to which the State has delegated certain powers of taxation for school purposes (which powers may or may not be restricted). Usually the local school fiscal unit is coterminous with the local school administrative unit. In States where both basic and intermediate units are found in the same State, taxing powers are generally delegated to the basic unit.

RESPONSIBILITIES OF THE STATE

Demands for increased services by the schools, brought about by the greater complexities of civilization, accompanied by a broader conception of governmental services, have served to focus attention upon responsibilities of the State in the problems relating to and involving local school organization. It is generally recognized that:

(1) The State is responsible for providing adequate educational services and facilities to all children within its borders.

(2) The State cannot meet this responsibility until the amount and kinds of educational services and facilities to be made available to every child in the State are recognized and fully defined as bases for the minimum (or foundation) educational program of the State.

(3) The minimum program (expressed in terms of irreducible standards) becomes an obligation to be assumed either by the State or by the State and local unit and represents the guarantee of the State to the child and society.

(4) As the State accepts this responsibility, it then becomes obligated:

(a) To establish plans and procedures for organizing the schools and the local school systems so as to make possible, as nearly as practicable, the attainment of these minimum standards for all children entitled to the privileges of public school.

(b) To safeguard the interest of the citizens by insuring that the organization proposed will operate economically and efficiently.

(c) To provide the necessary funds to carry out the program or to supplement those which local units can reasonably provide.

The State is in a position to acquaint citizens with the need for improvement, to take the initiative in planning and organizing programs for improvement, and to secure the cooperation of all agents and agencies which may aid in such programs.

It is evident that the State cannot assume the obligations set forth above without accepting the responsibility for the development of a long-time

¹ Definition of National Advisory Committee on School Record and Report Forms.

planning program conducive to such organization of schools and local school units as will insure the provision of all necessary facilities and services on the most efficient basis. Clearly the State must exercise the responsibility for leadership for developing a program for evaluating, planning, and attaining results.

A study made at any one time may result in making modifications to improve conditions existing at that time. In view of the fact that conditions are changing rapidly, the State needs to recognize that the educational program cannot be adapted to the needs of the child unless a continuous study is made and continuous readjustment is sought. In preparing plans and procedures for carrying on such a study the State should take the following steps:

1. Select a competent staff and develop plans for the cooperation of other State agencies and of advisory committees in carrying on the study.
2. Define fully the objectives of the study in conformity with the objectives of the State program of education.
3. Determine significant trends, changes, and tendencies as a basis for the establishment of standards, and establish practicable minimum and optimum standards for local school attendance areas and for administrative and fiscal units.
4. Prepare necessary forms for collecting and tables for classifying data, and define procedures for collecting, validating, and interpreting data.
5. Prepare all maps needed for the study of local school units.
6. On the basis of standards selected, assemble and evaluate data to show the present situation and needs.
7. Propose and recommend specific changes in the organization of school attendance areas and local administrative and fiscal units.
8. Interpret the proposed program to the citizens concerned so that they will have opportunity to understand fully all the advantages and to render intelligent decisions on a democratic basis.
9. Propose and recommend needed changes in legislation to encourage the proper development of local school units.
10. Determine the cost of the proposed minimum program and develop a satisfactory plan for financing the program.

These steps and procedures are presented and explained in detail in the following chapters. Obviously the development of a long-time planning program for creating more adequate local school units involves far more than the mechanical following of outlined procedures. There are many interrelationships and implications that can hardly be fully interpreted in a comparatively brief presentation. However, this presentation should assist States to recognize the importance of the problem and to establish procedures which will prove effective and which will aid greatly in the establishment of more adequate local school units.

Organization and Work of the Staff

RESPONSIBILITIES OF THE CHIEF STATE SCHOOL OFFICER

THE STATE has definite obligations and responsibilities for promoting the organization of adequate local school units. Consequently, the chief State school officer is the person who can exercise most effectively the essential responsibilities relating to the organization of such units. If he does not exercise or delegate these responsibilities, it may be expected that some other agent or agency in the State will sooner or later undertake needed studies. Whether such studies develop along the right lines and contribute directly to the advancement of the State program of education will depend largely upon the situation in the State and on the nature of the agencies undertaking the studies.

For example, various taxpayers' groups have, during recent years in particular, been interested in studies of local school units in a number of States; they have not always been in position to appreciate fully all of the educational problems involved. By nature of their organization, they may be inclined to be interested primarily in reducing expenditures. Accordingly, their proposals are likely to promote economy in terms of saving dollars and cents but, from a long-time planning point of view, may not be conducive to efficiency. The energies of such organizations are more likely to be directed into the right channels by proper leadership and guidance.

The major responsibilities of the chief State school officer in connection with a study of local school units may be summarized as follows:

1. Providing a planned program for the study of existing conditions as a basis for needed improvements in local school units. The provision in the budget for carrying on the study should be accompanied by an assurance that the objectives of the study are directly related to and constitute an integral part of the objectives of the State program of education.
2. Appointing a competent chairman or director to whom the responsibilities for carrying on the study can be delegated and with whose cooperation an effective organization and procedure can be planned.
3. Approving all policies relating to and involved in the study, including those pertaining to objectives, standards, and major procedures.
4. Securing the cooperation of all agencies in the State whose aid may be effective in carrying on the study. This will include the appointment of such advisory committees as may be found desirable.

5. Providing for the proper interpretation of the study program and of consequent proposals to local school officials and to the public in general.
6. Promoting legislation needed to assist in improving the local school unit organization and to finance the minimum program proposed as a result of the study.

THE CHAIRMAN OR DIRECTOR

A competent chairman or director should be able to put the program on a working basis without delay. He should be well-trained and experienced in order that he may evaluate and meet effectively the various problems that arise. He should be a good administrator as well as a capable research man as he will meet problems in both fields. His experience should be such as to enable him to view problems from a State-wide as well as local point of view.

The director should work in close cooperation with the chief State school officer and be directly responsible to him for proposing and executing policies which are to be followed. For these reasons it is preferable that he be a member of the State department of education staff.

There are, perhaps, States in which a cooperative arrangement can be effected with the State university so that the chairman or director may be a member of the State department staff and at the same time of the university faculty.

The major responsibilities of the director of the study may be summarized as follows:

1. To assume general charge of the study and be responsible to the State superintendent for the work.
2. To select a competent staff for recommendation to the chief State school officer.
3. To assign work to individual members of the staff and hold them responsible for such work.
4. To secure the assistance and cooperation of other State agencies that can contribute to the development of the program.
5. To arrange with local school officials for collection of data and for the appointment of local advisory committees.
6. To develop plans for properly interpreting the proposals.
7. To develop proposals for making necessary changes in the legislative and financial programs.
8. To direct the preparation of local and State reports to present the present status and the recommended program.

THE STAFF

The size, organization, and functions of the staff depend largely on the duration of the study, scope of work, and procedures to be used for the study of local school units.

Size.—The size of the staff is largely determined by the plan of work. If most of the work is to be carried on in and from the State offices, if the study is to be completed in a short period of time, or if it is to involve all types of local school units and is to include urban as well as rural areas, a larger staff will obviously be needed to complete the work in a given time than will be necessary if a more limited study is to be undertaken.

An effective and satisfactory study can be carried out in a State by having a full-time director with other members of the department staff assigned to the work for the duration of the study in any county or area. In many States limited budgets may make this plan of work necessary.

Organization.—The organization of the staff depends to a great extent upon the plan of work which is to be followed. A centralized rather than a decentralized plan of work is usually preferable; that is, all members of the staff will be expected to give their attention, in keeping with their respective functions and assignments, to the area in which the study is under way. It is possible, however, to follow a decentralized plan of work and to give members of the staff the responsibility for supervising all phases of the work in a given area or region. The work would then have to be coordinated, summarized, and perhaps interpreted in the State office.

Functions.—Although the functions which are to be exercised by the members of the staff for the local school units study in any State will be determined to a marked degree by the plan of work and by the existing situation in the State, certain functions will be common to all States and to all plans of work. These are set forth in later chapters.

If members of the staff are assigned functions in more or less specialized fields, problems of articulation must be carefully watched. If staff members think of themselves as being specialists only in restricted fields, the work may not be as fully integrated as it should be.

Functions may be assigned by the director on the basis of either of the following plans: One member of the staff may be held primarily responsible for supervising the collection, summarization, and tabulation of statistical data; another for the preparation of maps; a third for the editorial work; and, perhaps, a fourth for interpreting the study to local school authorities. One person may be assigned the responsibility for all phases of the study involving teaching personnel, another for pupil personnel, another for school buildings, another for finance, etc.

Plan of work of the staff.—The work of the staff established to carry on the study of local school units is outlined in later chapters. The plans for carrying on the work will have to be determined largely by the situation in a given State. Several plans are possible. On the basis of one of these, the central staff operating from the State capital would do all of the work. It would visit the area to be studied, assemble and interpret data, and prepare reports. Although this plan has many advantages, it has some disadvantages. That is, the study made in accordance with this plan is con-

sidered as a study by outside "experts"—the persons engaged in the study all come from outside the area to be studied.

Under another plan the central staff would establish objectives, standards, and procedures but would depend upon local school officials to assemble all data according to directions provided. Members of the central staff would visit the area to study the situation in detail and to assemble and check data already tabulated. The interpretations of the data and the preparation of the reports would be made by the central staff.

A third possibility calls for more cooperation of local school officials. Objectives, standards, and procedures would be established by the central staff after consulting with various advisory committees and local school officials. The data would be assembled locally by pupils, teachers, principals, and school officials. The central staff would work closely with the local groups and would even assist them in summarizing and in interpreting a large amount of the data. Part of the report might also be written locally by competent members of the school system, working under the direction of the central staff. All parts of the report would be carefully reviewed and revised by the central staff, and the more technical parts would be written by them. A smaller central staff would probably suffice to carry on the studies on the basis of this plan. All persons participating would gain valuable educational experience under the guidance and direction of the central staff. This plan of cooperative effort offers rich educational outcomes for a greater number of individuals and the program proposed is more likely to be understood and accepted by all concerned.

SECURING THE COOPERATION OF OTHER AGENCIES

No study of local school units can be carried on satisfactorily in any State except on the basis of a carefully developed program calling for the full and complete cooperation of all State agencies which can contribute effectively. The school program is shaped by the interplay of a great variety of social and economic factors. Data should be available regarding as many of these factors as possible so that the most significant may be given due consideration.

Professional groups.—As already pointed out, the State staff for the study of local school units and the chief State school officer should provide the leadership needed for organizing and carrying out the studies. However, this leadership can function most effectively and the studies can be carried out most efficiently only when the active participation of professional groups is secured.

Members of the faculties of the various colleges of the State should be in position to contribute considerably to the development of objectives, the establishment of standards, and the planning of studies. Outstanding professional and semi-professional groups, such as the State Educational Association and the State Congress of Parents and Teachers, should be thoroughly acquainted with the study from its inception and should feel

that their support has had some part in making it possible. The major objectives of the study should be endorsed by such organizations and by local school officials.

The United States Department of the Interior, Office of Education, may be in position to assist in planning or in carrying out certain phases of the study. Some cooperative plan may be developed, such as the one followed during 1936-37 in carrying out the *Study of Local School Units in 10 States* as a Federal Project, whereby the benefit of at least consultative services from the Office of Education may be secured.

Other State agencies.—The agencies in a given State which can contribute to the development of the program will depend to some extent on data already assembled in the State and on the work and functions of the various agencies. Among agencies which are most likely to be in position to provide data that are available or to cooperate effectively in carrying on certain phases of the study are the State planning board, the State tax commission, the State highway department, the State agricultural agencies, the State offices of the Public Works Administration, the Works Progress Administration, and the Farm Security Administration.¹

A *State planning board* has, during recent years, been established in most States. This agency should be thoroughly familiarized with the objectives, standards, and procedures of the study. Frequently State planning boards have themselves undertaken studies or have in their files copies of studies already made or outlines of studies being made which would have direct bearing on the organization of local school units. Basic, contour, and other types of maps, data or charts giving population trends, birth rates, and other valuable information are likely to be available in the files of the State planning board. This board should accept studies of local school units as one phase of its planning program and should plan to utilize the data and results from such studies. It is, of course, not expected that State planning boards will themselves undertake studies of local school units except with the approval and guidance of the chief State school officer.

The *State highway department* should be in position to contribute to the study of local school units by supplying maps. If maps that are available do not show recent changes in roads, the cooperation of this department may be secured in making necessary corrections in existing maps and in classifying roads. Moreover, it may have facilities for making reproductions of maps.

Information regarding *land use planning* is essential for certain areas of practically every State; in fact, the school program cannot be intelligently and effectively planned without such information. Information regarding land use planning may be secured from the State planning board and from the State land use planning specialist of the Farm Security Administration and from the Farm Security Administration of

¹ Formerly the Resettlement Administration.

the United States Department of Agriculture. While land use planning maps are important for all areas, they should be considered indispensable in areas where soils are far from uniform and where certain soils may not even be suited for continued agricultural use. State departments of industries and commerce and local chambers of commerce or boards of trade should be consulted to obtain information regarding industrial development, trade areas, and similar factors that may have direct bearing on the school program.

The *State tax commission* may furnish data on sources of wealth and income as bases for studying present and possible future sources of school income. Data on assessed valuation of property, including that of utilities, and other similar data are likely to be available and will be very helpful in interpreting the program.

ADVISORY COMMITTEES

While education is a function of the State, the schools are administered locally and are likely to be adjusted to meet local demands. Schools and school systems, therefore, cannot be expected to be changed or improved unless the citizens of localities and of the State agree that such changes are necessary. It is obviously desirable for members of the staff to confer with other groups and individuals.

The State advisory committee, appointed by the chief State school officer, or nominated by him for approval by the governor, should consist of both professional and lay persons whose opinions and recommendations are highly respected. All matters of policy, after being tentatively worked out by the chief State school officer and his staff, should be submitted to the State advisory committee for suggestions and approval so that cooperation may be had on all phases of the study. The members of the committee should be expected to attend all meetings and to take an active and intelligent interest in developing the most effective program possible.

Individuals appointed as members of local advisory committees should be open-minded and able to see problems from a broad point of view. Local committees should be assembled often enough during the planning and development of the program to get any suggestions the members may have to offer and to enable them to feel justly that the study is partly their responsibility and that they should contribute to the realization of the recommendations proposed. Local school officials can exert real influence in shaping the contributions of local advisory committees and can lend their assistance in keeping the general public informed of the progress of the study.

Defining and Stating Objectives

OBJECTIVES MUST BE DERIVED FROM FUNCTIONS

BEFORE ANY attempt is made to state the objectives of a study of local school units, a statement of the functions of these various units should be prepared and accepted. If such a statement is not prepared, it must be assumed in the statement of objectives. It would, therefore, seem desirable for the statement of functions to be in tangible form so as to reduce to a minimum the possibility of conflict or uncertainty.

Functions of a school.—There have been numerous statements which have attempted to give the specific functions of the public schools. In 1924 Chapman and Counts stated the functions of the elementary school which are summarized by Dawson as follows:¹

1. To bring together for educational purposes, regardless of social status and native endowment, all the children of the community, and to place them under the supervision of men and women carefully trained for the work of inducting these immature members into the life of modern society.

2. To foster activities that will insure the acquisition by the pupils of those basic skills, habits, attitudes, dispositions, ideals, and powers required of all members of organized society. The activities consist largely of the elementary mastery of the language and number acts, and through them the reading, imaginative study, and appreciation of those human experiences which have found expression in history, geography, social science, literature, art, music, and philosophy. The activities fostered should be appropriate to the mental and physical development of the children taught. It is now rather generally accepted that the elementary school should provide for approximately 6 years of training.

There is apparently much less agreement regarding the functions of the secondary school than of the elementary school. A commonly accepted statement in regard to the former was given by Inglis in 1918 and was summarized by Dawson as follows:²

1. To provide for an upward extension of the functions of the elementary school giving more comprehensive instruction in the fields begun on that level.

2. To provide the means by which the adjustment of the pupils to their social environment can be facilitated with the greatest amount of satisfaction to the pupils and to society.

3. To provide for the integration of social purposes and activities through the development in the secondary school population "of that

¹ Dawson, Howard A. Satisfactory local school units. Nashville, Division of surveys and field studies, George Peabody college for teachers, 1934. p. 12. (Field study no. 7.)

² *Ibid.*, pp. 12-13.

amount of like-mindedness, of unit in thought, habits, ideals, and standards, requisite for social cohesion and social solidarity."

4. To provide for differentiation among the secondary-school population through recognition of and provision for individual differences in abilities, capacities; and interests.

5. To provide preparatory training for the benefit of that part of the school population which should continue education in some higher institution.

6. To provide for selection among the secondary school population in keeping with the differences in individual capacities and with the varying needs of society. "In terms of school practice it means that if a pupil lacks ability and interest in one field of study but possesses ability and interest in another, discrimination is justified, and, particularly in the public secondary school, that pupil has a right to receive education in fields for which he possesses ability and interest. He cannot be deprived of the opportunity for education because of inability or lack of interest in some officially favored subject or subjects."

7. To provide for diagnosis of individual capacities and interests and for the direction of the pupil into fields in which he can work with most profit to himself and to society. "Hence the school must provide materials to acquaint the pupil with various activities of life, must give him some opportunity to test out and explore his capacities and interests and must provide some direction and guidance therefor."

According to a joint report³ of committees on attendance areas and administrative units under the chairmanship of J. Cayce Morrison and Edgar L. Morphet:

1. It is the function of the public school to provide an adequate educational opportunity for every child from the time he enters the school until he is ready to take his place in adult society.

2. An adequate educational opportunity includes:

(a) Guidance in social living culminating in a social studies program that fits youth to take an effective part in adult society.

(b) A health and physical education program that provides periodical examination for all children, corrective treatment for those who need it, recreation and play facilities, and guidance in healthful living during the 24-hour day.

(c) Mastery of the common integrating knowledges and skills needed by all persons who will live their normal lives outside institutional care.

(d) An adaptation of the program to the needs of children who may be in any way socially, physically, or mentally handicapped.

(e) A corresponding adaptation of the program to the needs of those children who are specially talented, including emphasis upon scholarship commensurate with capacity for achievement.

(f) Development of appreciations, abilities, and expressions through the creative arts.

(g) Opportunity for growth through manual activity; practical arts for the younger children and industrial and household arts for the older children.

(h) For older children, prevocational studies leading to later specialization in the skilled trades; and vocational preparation at

³ Reorganization of school units. Edited and compiled by Katherine M. Cook, Office of Education. Bulletin 1935, No. 15, pp. 12-13.

the lower levels for those who must seek employment at the close of secondary school period.

- (i) Organization of curriculum materials around the idea of child growth or development rather than through a group of more or less unrelated subjects.

Functions of an administrative unit.—Dawson states the functions of a local school administrative unit as follows:⁴

1. To provide schools that have the qualities and characteristics necessary to make available to all persons of educational age residing in that unit educational opportunities commensurate with their varying needs, aptitudes, capacities, and interests, and with the needs of society for the services and cooperation of such persons.

2. To furnish either at local expense, or State expense, or both, at a cost that bears a reasonable relationship to the total current cost of the educational program, administrative and supervisory services necessary to facilitate the operation of the whole educational program.

3. To furnish, where the State does not guarantee the payment of the cost of the entire educational program, sufficient financial resources to support a satisfactory educational program. * * * (When the administrative unit does not have the responsibility for providing financial support, the agency exercising this function is separately organized as a fiscal unit.)

Functions of the State.—Considerable attention has been given to the responsibility of the State for providing leadership and guidance and for taking the initiative in carrying on studies to insure the organization of adequate local units. The proper planning and the consequent organization of local school units is a major step toward solving many of the vexing educational problems now being faced in most States. The joint committee previously referred to gives the functions of the State in this respect as follows:⁵

A State should provide whatever assistance or guidance is necessary and desirable in reorganizing attendance areas and administrative units in accordance with defensible policies and procedures. * * * (The State should organize) attendance areas and administrative units * * * insofar as possible on the basis of objective studies rather than in terms of traditional boundaries. Such studies should take into consideration all relevant factors such as soil conditions, topography, climate, transportation facilities, and social and economic interests and relationships of the people.

OBJECTIVES MUST BE RELATED TO THE STATE PROGRAM OF EDUCATION

Not only is it important that the objectives of the study of local school units be defined in terms of the functions of schools and types of units, but that these objectives harmonize with and support the objectives of the State program of education. This is significant if practical and maximum results are to be realized from the study.

⁴ Dawson, Howard A. Op. cit., pp. 5-6.

⁵ Reorganization of school units. Op. cit., p. 15.

To accomplish this purpose numerous meetings of the local school units staff and of the regular staff of the department of education, will be necessary. It is only logical that members of the sponsoring agency, as well as those of the cooperating agencies, be given the opportunity to become thoroughly familiar not only with the study involved but with the State program of education.

Not only should the functions of schools and the types of local school units and the objectives of the State program of education be defined and stated, insofar as practicable, in advance of the study of local school units, but the objectives of the study itself should be as clearly and as fully stated as possible. Such a statement of objectives, although tentative at the time, will help to delimit the study and to furnish a basis for determining procedures to be followed. In effect, it is likely that the objectives of the study, as well as those of the State program of education, may have to be restated as the study program progresses. The organization and plan of work of the staff responsible for the study cannot be effectively projected until at least the major objectives of the study are clearly stated.

OBJECTIVES MUST BE BASED ON AN ANALYSIS OF THE SITUATION

In order that objectives may be practicable they must be based on a knowledge of conditions and needs in the State. This means that the findings of a preliminary but a fairly comprehensive analysis of the school situation should be available. It is true that a number of objectives can be considered with reasonable certainty as being universally acceptable; yet there are situations in each State which differ somewhat from situations in other States and therefore call for some differences in statement of objectives. For example, in one State existing laws may facilitate the proper organization of local school units merely by requiring action of the State or local boards. In another State the law may impose cumbersome procedures which make changes in local school units almost impossible. On the assumption that the major objective in each State is to effect the organization of satisfactory local school units, it is evident that in the first State attention needs to be centered on evidence to show the need for reorganization and to convince localities of the need for the changes recommended, and that in the second State attention needs to be centered on evidence to show the necessity for revising laws, as well as the need for reorganization.

STATEMENT OF OBJECTIVES IN THE LOCAL SCHOOL UNITS PROJECT

After the work of the study of *Local School Units in the 10 States* had been in progress about 7 months, a conference held in the Office of Education on August 14 and 15, 1936, was attended by the chief State school officers, the directors and associate directors of the projects in the 10 States, the

National Advisory Committee, appointed by the Commissioner of Education, and members of the Office of Education staff. This conference was considered advisable and necessary by all concerned to make definite plans for the work to be done during the remaining months of the study. Although each of the States had set up objectives for the study of local school units at the time of the initiation of the project, a committee of this conference group prepared a statement of "Objectives of Studies of Local School Units as Related to State Programs of Education." This statement does not attempt to define fully the objectives of a study of local units in any one State but rather to define objectives that are likely to be common to all States. It is hoped that this statement may be of value in any State interested in carrying on similar studies.

OBJECTIVES OF STUDIES OF LOCAL SCHOOL UNITS AS RELATED TO STATE PROGRAMS OF EDUCATION

I. Introduction.

It is assumed that:

- (1) The objectives of studies or projects involving local school units will be similar in all States.
- (2) The objectives of State programs of education which are directly related to or involved in any studies of local school units will also be similar, although points of emphasis will necessarily differ somewhat from State to State.
- (3) The objectives of any study of local school units cannot be fully realized unless they are directly related to and are synchronized with the objectives of the State program of education.
- (4) The State program of education in each State should be defined or redefined to embrace and include the objectives of the study of local school units.

II. *The State program of education as related to studies of local school units.*

The study of local school units must be an integral part of the State program of education. In order that this may be fully realized, it will be necessary for the State program of education to be defined or redefined to include the objectives which are involved in any study of attendance areas and local school administrative units. These objectives are to:

A. *Define services and facilities.*—The services and facilities (that is, the amount and kinds of education) needed by the children of the State should be clearly and specifically defined or redefined as often as may be made advisable by a changing civilization. To realize fully this objective, it will obviously be necessary to:

1. Establish those services and facilities which are imperative and which constitute an irreducible minimum as well as those supplemental services and facilities which are needed and are desirable.
2. Coordinate these services and facilities with those provided by other social and State agencies.
3. Select and specify both the minimum and the desirable services and facilities which should be provided by (a) attendance areas and (b) local school administrative units.

4. Establish minimum standards and procedures which will assure the provision of the irreducible minimum (that is the imperative) services and facilities which should be guaranteed by the State in the organization of satisfactory (a) attendance areas and (b) local school administrative units.

B. Plan adequate units.—Attendance areas and local school administrative units should be so continuously planned, organized, and administered on the basis of objective studies that each child will have adequate opportunity for continuous development from the day he should enter school until he completes satisfactorily at least 12 years of schooling.

1. The aim of all activities relating to the organization and administration of schools in the State and to the planning, organization, and administration of local school administrative units should be to provide improved and more efficient instruction for the children.

2. Local school administrative units should be of sufficient size to warrant the provision of all essential and desirable services except those that should be provided by the State.

3. Each of the attendance areas within an administrative unit should be of adequate size to warrant an optimum program of education which will meet the social and individual needs of all the children in each school.

C. Provide equitable financial support.—The State plan for financing education should be such as to encourage and, insofar as possible, assure the proper organization of local school administrative units in the interest of efficiency and with the burden of support equitably distributed among the taxpayers, thus guaranteeing the provision of adequate opportunities for every child.

III. Specific objectives of a study of local school units.

The specific objectives which should be realized in carrying out any study of local school units in a State are to:

A. Assist in defining services and in formulating standards.—The study of local school units should assist the State educational authorities to define or redefine the services and facilities (that is, the amount and kinds of education) needed by the children of the State.

In other words, the study should assist in establishing minimum as well as desirable services and facilities; in coordinating these services and facilities with those of other State and social agencies; in selecting and specifying minimum and desirable services and facilities which should be provided by (a) attendance areas and (b) local school administrative units; and in establishing standards and procedures which will guarantee the provision of these minimum services and facilities in the organization of satisfactory attendance areas and local school administrative units as set forth in II-A.

The facilities and services needed assume a complete educational program including transportation where necessary, as well as school buildings and equipment. Minimum standards should be expressed in terms of service, size, and cost.

B. Explain and evaluate educational conditions.—The study of local school units should be used as a means of presenting and evaluating for the

State as a whole, as well as for convenient subdivisions of the State, existing educational conditions as related to and as affected by attendance areas and local school administrative units.

This will involve the assembling of data and the preparation of maps, tables, and charts with accompanying interpretations. For each county or other convenient area in the State, school census spot maps on which children are located by age groups corresponding to the various types of school organization such as elementary and secondary schools, school transportation route maps, school building and site maps (status), district maps, etc., are essential. Tables should be so arranged as to make possible comparisons of data by types of schools and of school districts. This arrangement will be particularly significant for tables or charts showing services and costs.

Such additional or supplementary studies should be made as may be needed to carry out fully the purposes of the project. These detailed studies may include investigations of age-grade or grade-progress status, investigations of transportation to provide a basis for a program of State support, researches into capital outlay needs, etc.

- C. *Propose satisfactory plan of organization.*—A specific plan of organization for satisfactory attendance areas and local school administrative units should be proposed for each county or other convenient area in the State and for the State as a whole.

Insofar as possible, the proposed organization should be based on the minimum standards for the organization of attendance areas and local school administrative units established by the State and should be designed to overcome handicaps and defects in the existing school situation as affected by attendance areas and local school administrative units as pointed out in "B" above.

Land use, topographic, trade center, and similar maps will need to be prepared to supplement maps discussed under "B" above if the proposed organization is to be worked out and presented satisfactorily.

- D. *Propose legal principles.*—Principles to be incorporated in amendments to existing laws, or in new laws, relating to the organization of satisfactory schools, attendance areas, and local school administrative units in the State and relating to State and local school support should be clearly set forth.

This will involve a critical evaluation of present laws and State regulations relating to the organization of attendance areas and local school administrative units to determine obstacles in the way of effecting the organization of satisfactory attendance areas and local school administrative units. A similar evaluation of laws relating to State and local school finance, in order to determine handicaps which now exist, will likewise be involved.

- E. *Determine minimum cost.*—The minimum cost of carrying out the organization recommended in each of the proposed administrative units and in the entire State should be carefully determined. The ability of each unit to support the proposed program and the amount of

State support needed for each of the proposed local school administrative units and for the entire State should likewise be determined.

F. *Prepare reports.*—A report should be prepared for each county or other convenient area in the State and another report for the State as a whole, setting forth in full the findings and conclusions of the study.

These reports should incorporate maps, tables, and charts; should evaluate and interpret fully the significance of existing educational situations as affected by and related to attendance areas and local school administrative units; and should set forth and explain fully the proposed program in terms of accepted principles and the minimum standards adopted by the State. The steps which should be taken in order to carry out fully the various aspects of the program recommended should be clearly presented and fully explained and justified.

The following statement of objectives, prepared by the Local School Units Project staff of Ohio presents objectives that were considered specifically applicable to the existing situations at the time of the study. These statements are taken from the Ohio Handbook which appeared in mimeographed form early in 1936.

A. *Purposes of the study of local school units in Ohio.*

1. The main purpose of this study is best expressed in the language of the School Foundation Program. Quoted from the law setting up the program is the following:

Sec. 7600-1. On or before the first day of September 1935, and on or before the first days of April 1936, 1937, and 1938, each county board of education of the State shall prepare a diagram or map of the county showing the then location and position of all school districts therein, the location and character of roads, the location of streams and natural barriers, the location of each school building and of each route over which pupils are transported, together with a statement of the size and condition of each building and the number and ages of children attending the same. The territory in adjoining counties, or in any adjoining city or exempted village school district, which, in the opinion of the county board of education, should be attached to or detached from any such county, city, or exempted village school district for the purpose of economy, efficiency, and convenience, shall also be shown on such diagram or map. * * *

Sec. 7600-2. Upon completion of each of these surveys, the county board of education shall prepare a new diagram or map of the school districts in the county school district prescribing the transfers of territory, eliminations of school districts, or the creation of new school districts which will provide a more economical and efficient system of county schools; and on or before June first, annually, shall adopt the same as the plan of school district organization.

Sec. 7600-7. * * *. Upon approval of the director, such plan of organization within any county shall take effect upon a date to be fixed by the director, and thereafter no school

district or parts thereof shall be transferred or the boundary lines thereof changed unless such transfer or change of boundary lines is in accordance with such adopted plan of organization. * * *

2. To assist the county boards of education in carrying out item A-1, this study should develop a program of school organization in each county in the two following steps:
 - (a) Changes that should be effected before 1940.
 - (b) Changes that should be effected after 1940.
3. To provide wherever feasible in the recommended program for all territory in the State to become a part of a school district offering at least 12 years of instruction for all children mentally and physically capable of profiting by that amount of instruction. In 1935-36 there were approximately nine hundred school districts in Ohio without high school facilities.
4. To provide wherever feasible for a school organization consisting of a 6-year elementary school and a 6-year high school.
5. To set up reorganization standards and apply them in the development of the individual county reports. These standards should take into account the following:
 - (a) Generally accepted trends in public education.
 - (b) The application of the School Foundation Program.
 - (c) All such changes as will "provide a more economical and efficient system of county schools."
6. To make specific recommendations on additional buildings, additions, and alterations together with their location and cost estimates. Such recommendations should be based on the maximum use of the buildings now available.
7. To make a detailed and intensive study of school transportation looking toward a different method of allocation.
8. To ascertain the points where either new legislation is required or present legislation should be repealed or amended.
9. To endeavor to show clearly both the education and economical advantages of the recommended program of reorganization.
10. To furnish to each county superintendent a complete set of all the forms and maps used in connection with this project for his office use.
11. To reproduce each county report in sufficient quantities so that they will be available to local superintendents; local boards of education, and other interested persons.
12. To provide a State-wide report for Ohio, showing present status, trends, reorganization procedures, county summaries, and other items of State-wide interest.

Defining Minimum Standards

STATEMENT OF STANDARDS ESSENTIAL

To be effective, standards must be sufficiently high to be used as bases for judging progress in all areas, which means that they must be higher than those which are attainable in less favored areas. For example, if the standard for elementary schools, as measured by the number of teachers, is set as one teacher per grade, there may be certain areas in which such schools cannot be established because of impassable roads, sparsity of population, etc. Conditions under which such standards are not universally applicable should be specifically stated. Similarly, conditions under which they may be expected to be exceeded should also be definitely stated.

Minimum standards, as statements of possible attainment within practical situations and at reasonable instances, are not new terms. Their importance in any enterprise is well recognized. Many governmental agencies have established objectives, rules, regulations, and standards for the operation of various functions of these agencies. In its discussion relating to the necessity for minimum standards for schools, attendance areas, and local administrative units, Oklahoma presents the following:

It is generally accepted that the State has a definite responsibility to guarantee to each child the opportunity to secure at least the minimum essentials of education. In the field of instruction the State has provided for the inspection and accrediting of high schools. Accredited schools must adhere to very definite standards relating to length of term, training of teachers, buildings, equipment, instruction, textbooks, and all other factors that bear upon the efficiency of the school. It must be emphasized that, in this case, the State has set up standards by which the school, already established, is judged. These standards have been applied more to the quantitative aspects or the aspects which can be measured by quantitative scales than upon the qualitative or intangible aspects. Objective standards were not usually applied to the procedure by which the schools were organized. Certain assumptions are made that relationships exist between presence or absence of provisions or arrangements and the efficiency of instruction.

Since many of the weaknesses found in Oklahoma schools today exist because the schools are too small in enrollment and too weak financially to provide a satisfactory program, it seems as much the duty of the State to assume leadership in the formulation of standards relating to

¹ Study of local school units in Oklahoma. Oklahoma City, Okla. - State Department of Education, 1937, pp. 67-68.

the size of attendance areas as it is to enunciate and enforce standards relating to instruction. After satisfactory attendance areas have been established, some means must be provided whereby the individual schools can be assured of adequate administrative and supervisory services and by which equality of educational opportunity can be approached. If this is true, it is important for the State to promulgate standards for the formation of administrative units as well as attendance areas. As long as schools are permitted to be organized without strict adherence to objective standards of size and financial ability, satisfactory progress cannot be made toward equality of educational opportunity for all the children. Eventually the State will find it impossible to continue to apportion money to units that cannot guarantee a proportionate increase in efficiency and in enrichment of the educational program.

STATUS OF STANDARDS

Although some States have made much more progress than others, all States have established some standards in education. A study of such standards in any State will probably show that they may be expressed in one or more of the following ways:

Laws.—Many standards are to be found incorporated in State laws with the result that some of the commonly accepted standards appear as legal prescriptions in practically every State. The extent to which standards should be written into laws is a question subject to debate. Many authorities take the position that, in the main, minimum standards should be a matter for regulation by the State board of education. Instances can be found where standards have been enacted into law and have continued to be operative after the need for establishing higher standards has become evident. For example, in a number of States details regarding teacher certification are written into the statutes. Because several low type certificates are thus authorized, teachers with only a limited amount of training are in many instances today being employed, even though teachers with better training are available. In general it has been more difficult to have desirable standards enacted into law than to have them set up as regulations by the State board of education.

Regulations.—In practically every State some standards are embodied in the regulations set up under the discretionary power of governing boards, including boards of education of local and intermediate units and of the State. In many States one of the functions of the State board and/or department of education is to establish minimum standards on the basis of evidence of need as submitted by State school authorities.

Tradition and custom.—In almost every State there are some standards relating to the school program which are accepted and generally recognized but which have never been incorporated into law or into the regulations of the State board of education. Such standards when widely enough accepted may be just as significant from the point of view of determining practices as if they had legal standing. For example, there may be no law or regulation relating to the level of salaries of teachers, yet custom influ-

enced by resources, by supply and demand of teachers, and by other factors may have resulted in comparatively uniform salary levels in the several types of local school units.

DERIVING STANDARDS

While reasonably accurate standards have been developed by which school achievements can be measured, there has been less progress toward the building of standards by which attendance areas and administrative units can be measured. Schools and local school units generally have been permitted to combine with little reference to definite standards of organization. Data relative to the number of schools and the various types of administrative units in a State and in the Nation over a period of years show that there is a definite trend toward larger and fewer local school units. Rapid changes in the social and economic life of the people, decreased local support, with a consequent increase in State support and other factors indicate that the trend toward centralized schools may be expected to continue and may perhaps assume an increased rate. Certainly it is incumbent upon the educational authorities of the State to take the initiative and to assume leadership in this development. To determine whether a proposed centralization is desirable necessitates measures in the form of definite and well-established standards. It is common knowledge, for example, that a relationship exists between the number of teachers and the breadth and richness of the program of studies. A review of the situations in the schools of most States will indicate the lack of objective standards by which existing attendance areas and local units of school administration are and may be measured.

As pointed out by Dawson, analyses of the characteristics of satisfactory schools, school attendance areas, and local units of administration and finance provide bases for establishing desirable minimum standards.² To undertake successfully the establishment of standards, the State should review studies and recommendations in this field. At the same time it should collect and classify standards now in use as a basis for further analyses to determine which of these standards should be continued and which should be modified. As an aid in determining whether standards being considered are reasonable, it will be necessary to make a detailed analysis of resources, practices, and possibilities in the State and to have available complete information reflecting trends and status of the existing organization.

As a State defines its education program in terms of minimum standards, it, in reality, defines the services and facilities which are to be made available to the children of the State through the schools. Such minimum standards must not be confused with desirable or optimum standards and should never be considered as final. They need to be clearly defined and re-defined as

² Dawson, Howard A. Satisfactory local school units, Field Study No. 7. Surveys in Field Studies. George Peabody College for Teachers, Nashville, Tenn., 1934.

the State's guarantee of the educational rights of the child as frequently as may be made advisable by changing civilization.

SUGGESTED STANDARDS

Standards must necessarily be stated in terms of types of units; that is, standards for attendance areas will be distinct from standards for administrative units and the latter may or may not be distinct from standards for fiscal units. Several attempts have been made to state standards that are generally applicable. A few are quoted below:

*Attendance areas (schools).*³—The first and chief function of a local school unit is to maintain such free school facilities as will best carry out the major purposes of public education. These major purposes are the improvement of the economic, political, social, and individual welfare of the Nation and its people. The characteristics of public schools that will contribute to the most effective realization of these major purposes have been determined by analysis of existing conditions, research findings, and expert opinion.

Elementary schools should:

1. Offer 6 years of instruction;
2. Have a desirable minimum of seven teachers or an absolute minimum of six teachers;
3. Have an average of approximately 40 enrolled pupils per teacher;
4. Have, therefore, approximately a minimum of 240 to 280 pupils per school.

High schools should:

1. Offer 6 years of instruction, or 3 years of junior high school instruction and 3 years of senior high school instruction under separate organizations;
2. Have a desirable minimum of 10 teachers or an absolute minimum of 7 teachers;
3. Have an average of approximately 30 pupils per teacher in a 6-year high school, 35 pupils per teacher in a junior high school, or 25 pupils per teacher in a senior high school.
4. Have, therefore, approximately a minimum of 210 to 300 pupils in a 6-year high school, 245 to 350 pupils in a junior high school, and 175 to 350 pupils in a senior high school.

All schools should be housed in plants that are consistent with acceptable standards, that are properly and efficiently operated, and are equipped with textbooks, instructional materials, and library facilities. Schools should be in session for at least 36 weeks per year.

In all cases where schools of the desirable size have been located at too great a distance for the pupils to walk to school conveniently from their homes, transportation facilities at public expense should be provided for all children who live more than $1\frac{1}{2}$ miles from the school.

These standards as to satisfactory schools have direct bearing on the determination of local attendance or school units. The minimum standard size of satisfactory attendance units is:

1. For elementary schools, an area in which reside at least 240 pupils enrolled in elementary school grades.

³ Ibid., p. 39.

2. For a 6-year high school, an area in which reside at least 210 pupils enrolled in high school grades.
3. For a junior high school, an area in which reside at least 245 pupils enrolled in the junior high school grades.
4. For a senior high school, an area in which reside at least 175 pupils enrolled in the senior high school grades.

These standards were expressed as follows by a committee representing the Conference on Reorganization of Local School Units held in Washington in 1935:⁴

- (a) The attendance area includes all the children attending or eligible to attend a single school. In general, it should be considered an elastic subdivision of an administrative unit. The area of the attendance unit will probably vary from State to State and from locality to locality, depending on roads and climatic conditions, population density, age of the children involved, educational leadership, and other related factors.
- (b) The elementary attendance areas should, insofar as possible, be large enough to meet the following minimum criteria:
 - (1) Make possible a school with at least one teacher per grade, with a desirable ratio of 30 pupils per teacher.

The pupils, however, should not have to walk more than $1\frac{1}{2}$ or 2 miles to or from school, or ride on a school bus more than 1 hour (preferably including time of walking to the bus) each morning or evening, or be transported over roads that present extreme hazards.

- (c) The high school attendance area may be subdivided as occasion demands into junior and senior high school attendance areas, which may, in turn, comprise several elementary school attendance areas. The optimum size of the unit will depend largely on density of population and facilities for transportation; but it should, except under unusual circumstances, be large enough to meet the following minimum criteria:
 - (1) Make possible a junior high school with at least 300 pupils and 10 teachers, a senior high school of 300 pupils and 10 teachers, or a junior-senior high school of 300 pupils and 10 teachers.

The pupils, however, should not have to walk more than 2 or $2\frac{1}{2}$ miles to or from school, or ride on a school bus more than $1\frac{1}{2}$ hours (preferably including time of walking to the bus) each morning or evening. It is recognized that wherever density of population permits or transportation is feasible, high-school attendance units large enough to make possible the development of considerably larger schools are desirable.

The following standards have been suggested for location of schools:⁵

- (3) Location of schools.
 - (a) The general topography of the country including streams and other natural barriers, soil conditions, and the present and

⁴ Reorganization of school units. Op. cit., pp. 16-17.

⁵ Handbook of procedures for planning the reorganization of local school units. United States Department of the Interior, Office of Education, Circular No. 156. (Mimeo.) 1936. p. 10.

- probable future conditions of the roads should be considered as determining factors in the location of schools.
- (b) The existence of community lines and community activities should be considered as determining factors in the location of schools. Where the removal of the school would do too great violence to certain well-established community enterprises and attitudes a school should not be removed, although it may not meet the standards of the minimum size of schools.
 - (c) Schools should be located in relatively permanent centers of population. Permanency of population is to be judged not alone by the growth of population in the past, but also by present factors that will probably influence the stability, growth or decline of population in the future. It frequently happens that the presence of some particular factor, such as a local industry and the likelihood of its removal, will point to a more reliable index of the future population development than any statistical formula or trend.
 - (d) Schools should be located near the principal center of population so as to be convenient to the maximum number of pupils affected, and on the most suitable site available. Transportation at public expense should be kept at a minimum by the location of the school building in such way as to permit the maximum number of children to walk to school.
 - (e) If it can be demonstrated that in the long run the abandonment of usable schoolhouses will be more economical, the present buildings should be abandoned without regard to their present condition, and new buildings on new locations provided.

Various statements of standards for school buildings are available. The following is taken from the Handbook:⁶

(5) School buildings.

- (a) The school buildings should be planned from a functional point of view, i. e., they should be built with definite education services in mind.
- (b) The building should be arranged and constructed so as to be free from fire and accident hazards. It should be properly lighted, heated, and ventilated, and so oriented as to facilitate such provisions.
- (c) The building should be equipped in such a manner as to make possible the maximum of health, safety, and instructional efficiency of both pupils and teachers.
- (d) The school site should be easily accessible, well drained, free from hazards to health and safety, free from disturbing noises, and should have ample playground facilities. There should be a minimum of one acre for each 50 pupils, and a minimum of 5 acres for any school having 250 or more pupils.
- (e) If by alterations or additions present school buildings can be made to meet the standards set up, then remodeling should be considered. Otherwise, new buildings located on suitable sites should be recommended.

⁶ Ibid., p. 11.

The following standards were used in the Ohio Study of Local School Units:⁷

1. The organization of schools.

* * * *

(b) The school system should be organized on the basis of a 6-year elementary school and a 6-year high school, except under the following conditions:

- (1) A 6-year high school should *not* be organized unless there are enough pupils in the 7th and 8th grades so that their coming into the high school will bring two additional teachers.
- (2) If there are enough pupils in grades 9 to 12 to require a minimum of seven teachers, and sufficient enrollment in grades 6, 7, and 8 to require three teachers in each building where such grades are housed, thus giving opportunity for departmentalizing the work in those three grades, a 6-year high school would not be recommended if an appreciable amount of transportation is required by so doing.

2. Size of schools.

Conforming with the foundation program there should be an A. D. A. of at least 180 pupils in each elementary school and the high school, although still larger schools are desirable. In general there should be no less than 1 teacher for each grade in grades 1 to 6, and 7 teachers in grades 7 to 12. However, where transportation costs are excessive in getting elementary schools large enough for 6 teachers an organization which provides 1 teacher for *not* more than 2 grades is satisfactory.

3. For the purpose of estimating the number of teachers needed in schools larger than the minimum size, the number of pupils per teacher should approximate the following:

Elementary schools	35 pupils.
Junior high schools	30 pupils.
Junior-senior (6-6) high schools	28 pupils.
Senior or 4-year high schools	25 pupils.

The above units are based largely upon average practice and experience. They may not be the size that will give maximum efficiency but they are the best we have.

Administrative units.—Dawson reached the conclusion that—⁸

We may conclude, therefore, that for a standard organization, the local administrative unit should have 280 teaching units. Since the number of teaching units may be expected to be equally divided between the 6-year elementary school and the 6-year high school, there will be 140 elementary teaching units and 140 high school teaching units. In terms of the number of pupils, using the standards of 40 pupils per elementary teaching unit and 30 pupils per high school teaching unit, there will be a total of 9,800 pupils.

For the median modification of a standard organization for administration and supervision there should be approximately 162 teaching

⁷ Handbook, Ohio Study of Local School Units, T. C. Holy and J. A. McKnight. State Department of Education, Columbus, Ohio, 1936. pp. 27-28.

⁸ Dawson, Howard A. *Op. cit.*, pp. 81-82.

units, of which 81 will be elementary-school units and 81 high-school units, to accommodate 5,670 pupils. For the maximum modification of a standard organization for administration and supervision there should be approximately 46 teaching units, of which 23 will be elementary-school units and 23 high-school units, to accommodate 1,610 pupils. In terms of the number of pupils, these figures are in fair agreement with the sizes previously determined on the basis of the number of pupils each of the organizations for administration and supervision can serve effectively. In the preceding chapter it was shown that the number of pupils for each organization is approximately 12,000, 6,000 and 2,000 respectively.

The conclusion to be drawn is that the absolute minimum size of a local unit of school administration is a unit that has approximately 1,600 pupils and 46 teaching units. However, if combination of functions and services in more than one major field by any individual in the personnel of the administrative and supervisory organization is to be avoided, a local unit of school administration must include at least 9,800 pupils and 280 teaching units.

On the basis of the assumption stated above and of the data presented, the minimum size of a satisfactory local unit of school administration has been found to be approximately 1,600 pupils and 46 teaching units. It has also been found that in order to avoid the performance of two or more specialized services by one individual the size of the local school unit of school administration should be approximately 9,800 pupils and 280 teaching units.

The report of the committee representing the Conference on Reorganization of Local School Units recommended that:⁹

3. To guarantee the development and continuance of an adequate educational program in any administrative unit there are needed:
 - (a) A board of control to determine policies.
 - (b) An administrative professional leadership vested in one person to coordinate all the services of the school in the interests of the child.
 - (c) Direction and supervision of instruction, including special schools, classes, and services.
 - (d) An efficient business management, including the operation and maintenance of the school plant and transportation.
 - (e) Direction and supervision of attendance, including relationships with social-welfare departments and agencies.

9. The following principles are suggested as pertinent to the organization or reorganization of administrative units:

- (a) An administrative unit should comprise 1 or more attendance areas (ordinarily 2 or more) offering educational facilities at least through the 12th grade. (Only under exceptional circumstances, due to such factors as extremely sparse population or rugged topography, should an ad-

⁹ Reorganization of school units. Op. cit., pp. 13-14 and 17-18.

ministrative unit comprise only an elementary or an elementary-junior high school attendance area.) Administrative units comprising elementary-junior-senior high-school and junior-college attendance units may be recognized for the larger centers of population.

- (b) An administrative unit should be sufficiently large to warrant the provision of all essential and desirable administrative and supervisory services except those provided directly by the State. Ordinarily, several elementary-junior-senior high-school attendance units will be involved.
- (c) The boundaries of the school administrative unit need not be coterminous with the boundaries of any political subdivision of the State. An administrative unit may include part of a county, a county, or two or more counties or cities, or a city and part of a county.
- (d) If the principle of State support of a minimum educational program is recognized and applied there will be little occasion for organizing administrative units in terms of their ability to be self-sustaining. Emphasis can then be placed increasingly on the optimum unit for the efficient and economical provision of the desirable educational offerings.
- (e) The State should make provision for any administrative unit to contract or arrange with any larger administrative unit for the education of children who need more highly specialized types of educational opportunity than are provided in their own unit.

Brisco¹⁰ stated that "Usually school units do not become real superintendencies until they are large enough to employ 40 teachers * * *. While many superintendencies are smaller than 40 teachers, the superintendent in smaller units often spends much of his time uneconomically * * *."

Finance.—Dawson states that¹¹ "The size and characteristics of the local school unit, both attendance and administrative, have a very definite influence on the system of financial support of public schools and *vice versa*. These interrelationships are indicated in the following summary statements:

The influence which increasing the size of the local school units has on the cost of the educational program will depend upon the factors in any particular situation. A better educational program may be obtained at the same cost, increased cost, or less cost than the program under smaller units, or it may happen that although the instructional program is not greatly changed, equality of financial burdens and economy in administration will result.

As a general rule the smaller and more numerous the local school units, the more complicated and cumbersome must be the method of apportioning equitably State school funds to local units. On the other hand, the larger the local school units, the simpler the method of State apportionment can be in order to be equitable. The method of

¹⁰ Brisco, Alonzo O. *Size of the Local Unit for Administration and Supervision of public schools*. Bureau of Publications, Teachers College, Columbia University, New York, 1935.

¹¹ Dawson, Howard A. *Op. cit.*, pp. 167-68.

apportioning State school funds to local units may be such as to hinder or to accelerate the reorganization of local school units.

The method of apportioning State funds to local school units may be such as to retard and hinder the desirable plan of school organization for instructional purposes, as, for example, in California where school organization according to the 6-3-3 or the 6-6 plan has been greatly retarded by the plan of apportioning State funds.

If adequate school units are to be maintained throughout a State the amount of State funds provided and the plan of apportionment must be sufficiently flexible to finance all the elements of a satisfactory program under all conditions. On the other hand, if the State is to receive the maximum returns for the money spent, it must spend its money through adequate local school units.

Since the State has plenary powers over the school system and complete responsibility for its control, the primary obligations for financial support rest with the State. The State can either discharge this obligation itself or require local units to do so. The latter course has been too largely pursued and the result has been inadequate support by the States.

There are two general plans for the State support of public schools: the large-fund plan whereby the State pays the entire cost of the minimum educational program; and the small-fund plan whereby the State guarantees the funds to pay the cost of the minimum educational program after the local unit has levied a specified minimum tax rate for schools. Under both plans the local units should be delegated power to raise funds locally to pay for an educational program better than the minimum required by the State.

SUGGESTIONS FOR PROPOSING STANDARDS

The following outline is suggested for guidance in establishing and stating standards relating to attendance areas and local units of school administration and finance:

Attendance areas.

1. *Proposed minimum standards in terms of services.*—Give as specifically as possible the proposed minimum standards for each of the following and justify the standards proposed:

- (a) Teachers. Give standards for training, experience, and salaries.
- (b) Curriculum. Give scope (breadth and length).
- (c) Transportation. Specify conditions under which pupils are to be transported.
- (d) Buildings. (Seating space, special rooms, etc.).
- (e) Equipment.
- (f) Supplies.
- (g) Library, janitors, heating, repairs, and other services to be provided *at the school*.

2. *Proposed minimum standards in terms of organization of schools.*—Determine type of school organization needed to promote objectives already set up, that is, determine whether schools should be organized as elementary and secondary, or as elementary-junior and senior high schools, or whether some other type of organization is desirable. It will then be necessary to define the

- extent of the program for each level of the school organization and to determine what services and facilities should be offered on each level.
3. *Gross unit cost.*—Determine and propose gross unit cost consistent with services and facilities proposed above. These gross unit costs should obviously include salaries for teachers which should be expressed in terms of unit costs per teacher, rather than unit costs per pupil, buildings (cost per classroom), transportation (cost per bus), etc.
 4. *Proposed minimum standards in terms of size of schools.*—
 - (a) Elementary schools.
 - (1) Grades per teacher. Indicate whether each teacher is to be expected to have one grade or more.
 - (2) Pupils per teacher. Give minimum and maximum number of pupils, average enrollment, and average daily attendance for which each teacher should be responsible.
 - (3) Teachers and pupils per school. Give minimum size, average enrollment, and average daily attendance of proposed elementary school.
 - b) Secondary schools. Follow similar procedure in establishing minimum standards for number of pupils per teacher and for size of secondary school.
 5. *Proposed minimum standards in terms of unit costs.*—Translate minimum services and standards proposed under 2 and 3 above into unit costs. *This is a very important step and must be very specific.* For example, if a minimum training of 2 years is proposed for elementary teachers and a minimum salary of \$90 per month is proposed for each elementary teacher with such training; if, further, each elementary teacher is expected to handle a grade with 30 elementary pupils in average daily attendance, the minimum unit cost in terms of teachers' salaries would thus be \$90 per teacher per month or \$3 per pupil per month or 15 cents per pupil per day (assuming that all pupils are in attendance every day). The unit cost for each of the other services recommended should then be added to get unit costs for all services to be provided at any school which meets minimum standards in terms of size. Adjustments will have to be made to allow for such factors as density or sparsity of population, etc.
 6. *Proposed minimum standards for location of schools.*—State consideration to be given to centers of relatively permanent population, central location, existence of good school buildings, community lines, natural barriers, etc.
 7. *School buildings.*—Give criteria to be used in judging adequacy of school buildings.
 8. *Obligation of the State.*—The obligation of the State to assist in establishing schools at which these minimum services and standards can be assured should be clearly explained.
 9. *Factors to be considered in applying minimum standards.*—Conditions vary considerably in various parts of a State and frequently even within a county. The factors which are to be considered in establishing attendance areas in terms of these minimum standards should be clearly set forth. Explain when or under what condi-

tions school centers will be recommended which do not meet these minimum standards, particularly in terms of size and number of pupils per teacher.

10. *Obstacles or handicaps to be faced.*—Call attention to major obstacles or handicaps which must be faced if proposed minimum standards are to be realized.

Local school administrative units.

1. *Proposed minimum standards in terms of administrative and supervisory services.*—List specific services that should be available in each administrative unit. Do not include here services which should be provided by a school which meets minimum standards.
2. *Proposed minimum standards in terms of size.*—Specify here the minimum number of pupils and teachers desirable for any administrative unit. This should not be confused with the number of pupils or teachers considered necessary for a school which meets minimum standards. Moreover, the unit which can be recognized as a first step in carrying out the recommendations should not be accepted as providing standards to be recognized for the final step. (Minimum standards for administrative units should also be stated in terms of attendance areas involved.) Justify minimum standards proposed.
3. *Proposed minimum standards in terms of costs.*—Include here unit costs for administrative and supervisory services. Do not include minimum costs for teachers' salaries, libraries, and other services which should be provided at individual schools. The unit costs should be expressed in terms of the cost per pupil in average daily attendance and also in terms of the percent of the total current cost which may be expected to be devoted to administrative and supervisory services.
4. *Obstacles or handicaps to be faced.*—List major obstacles or handicaps which must be faced if proposed minimum standards are to be realized.

Fiscal units.

1. *Proposed minimum standards for financing program in local school administrative units.*—Such items as the following should be covered:
 - (a) What is the obligation of the State to assure minimum standards for all school and administrative units in terms of minimum costs?
 - (b) Should each administrative unit have leeway to finance a program beyond the minimum proposed? If so, how much leeway?
 - (c) What local tax should be required to be levied by all administrative units?
 - (d) What obligation has the State to provide funds to meet minimum costs above those which can be met by uniform local tax levies? If the ratio between assessed and real values varies greatly, this factor, must be considered in proposing minimum standards for the financial program.
2. *State program.*—Explain the obligation of the State to provide a plan which will facilitate needed reorganization. Show why the taxpayers cannot be expected to support present status regardless of justification. Point out relationships between State plan of finance and possibilities of carrying out minimum standards.

3. *Obstacles or handicaps to be faced.*—List major obstacles or handicaps which must be faced if proposed minimum standards are to be realized.

In the *Fifteenth Yearbook of the Department of Superintendence* the following are suggested with reference to finance:¹²

- (a) Tax units for public schools should be organized for the support of all public education for pupils up through at least 20 years of age. In other words, every local section of a State should be required to participate in the financial support of public education through what is now recognized as the secondary school period.
- (b) School tax units should be independent of all other municipal and quasi-municipal organizations.
- (c) School tax units should be so organized as to guarantee the exertion of a minimum financial effort toward the support of public education by every local area of the State.
- (d) In determining the reasonable minimal financial effort that is to be required of local areas in the support of public schools, the total tax burden of the area included in the school tax unit should be considered.
- (e) In the establishment of school tax units, governing legislation should differentiate between taxes for current expenses and taxes for programs of capital outlay.

¹² *Fifteenth Yearbook of the Department of Superintendence*, 1937. p. 135. National Education Association. Washington, D. C.

Collecting and Organizing Data

TYPES AND SOURCES OF DATA

In order to have available in compact form information required for studying existing educational conditions, provisions should be made for having data for the year of study recorded by schools, or school centers, and by local school administrative units. It will probably also be necessary to have some data collected for additional years, preferably by intervals of years, to show, for example, trends in general and school population and assessed valuations of taxable property, and some to show certain facts in greater detail, such as distributions of receipts by sources and amounts and of expenditures by the generally accepted classifications.

Although most data will be derived from official school records and reports, some will be found in records and reports of other organizations. In addition, interviews and questionnaires will be helpful in securing relevant information.

The information which is presented in the report should be arranged to show the adequacy or inadequacy, as the case may be, of all local units. Where this is done, any need for improvement will have been indicated.

After the staff has been organized, and after objectives have been stated and standards determined, the next step will be the collection of data. The following are suggestions for this work:

All data should be collected where readily obtainable in acceptable form.—If valid data are not available in local and State offices, some plan must be made for collecting information elsewhere.

The statement of objectives and standards will indicate what information is needed.—The justification for collecting data is, of course, its pertinency for the study.

Only information for which a definite use has been established should be collected.—The following of this rule will tend to encourage, insofar as practicable, the planning of all phases of the study in advance and to reduce to a minimum the collection of facts not needed.

A thorough canvass should be made to insure that all data which are likely to be significant are listed for tabulation.—It is more economical and desirable as a preliminary step to list all types of data which should be tabulated than to attempt to supplement tabulations after the study has been begun.

Classifications for factual materials to be included should be carefully determined.—A summarization by types of schools, for example, according to the number of teaching positions will expedite the final work.

Tabulations for each area to be studied should be arranged so that comparable data are available for State-wide summaries.—If data for one county or area are classified according to step intervals that differ from those used in another county or area, State-wide summaries will be difficult, if not impossible. Effective plans must anticipate the use of tabulations for comparing localities and even States.

Definite procedures should be established and adhered to for checking data and tabulations for accuracy.—Inaccurate information will render ineffective some of the findings and consequently the proposals.

Forms for collecting and tabulating information should be prepared so as to facilitate the use of data in revealing status and trends.—For convenience, data to be collected may be classified as statistical and descriptive.

COLLECTING AND TABULATING STATISTICAL DATA

Data which are listed together or in close proximity in source materials (registers, local reports, etc.) should be recorded, insofar as possible, in the same order on the tabulation form. Mistakes are much less likely to occur when data from consecutive columns can be copied in the same order. Insofar as possible, data should be arranged on the forms in the order in which they are to be included in summaries. It is more difficult to prepare summaries from several tabulations or from isolated parts of the same tabulation than it is to summarize data more conveniently located.

Some of the information will be recorded so as to reveal significant trends. Among the statistical data relating to trends which are likely to be of significance are the following:

- General population.
- School population.
- Enrollment, membership, and average daily attendance by schools—Elementary and secondary.
- Number of schools according to number of teaching positions—Elementary and secondary.
- Number and percent of pupils enrolled in schools according to number of teaching positions—Elementary and secondary.
- Number and percent of pupils enrolled according to length of term—Elementary and secondary.
- Number of pupils enrolled according to types of administrative units.
- Number and percent of teachers according to amount of training in years—Elementary and secondary.
- Number and percent of pupils transported at public expense—Elementary and secondary.
- Number of teaching positions according to salaries paid—Elementary and secondary.
- Number of teaching positions, by types of administrative units.
- Number of administrative units, by type.
- Number of administrative units, according to area.
- Number of administrative units, according to assessed wealth by school census child.
- Expenditures for teachers' salaries by schools—Elementary and secondary.

Expenditures for transportation—Drivers' salaries, operation and maintenance, and capital outlay.

Total current expenditures, capital outlay, and debt service.

Revenues (receipts), according to Federal, State, and local sources.

Indebtedness in bonds, short-term loans, and for current expense.

Information which should be available about each pupil for the year of study includes his name, sex, age as of September 1, age at entrance, grade in which now enrolled, number of years in school previous to this year, and residence (if possible, according to quarter-section, section, township, and range).

If a study of the teaching personnel is to be included the following information should be obtained, if not already available, for each teacher:

Name.

Age.

Sex.

School where employed.

Grades or subjects taught.

Training (college and university):

Major field (semester hours).

Minor field (semester hours).

Degrees held.

Experience in years:

Total.

In present school system.

In present position.

Annual salary.

Information should be available for each school—elementary, junior, and senior—in an administrative unit to show:

Name and number of school.

Names of all pupils of school census age in school and not in school.

Grade last attended by each pupil.

Residence of pupils.

Enrollment.

Membership and average daily attendance by grades.

Pupils transported at public expense.

Number of teaching positions.

Pupil-teacher load.

Salaries of teaching and other personnel.

Instructional salary cost per pupil in average daily attendance.

Length of term (days school was in session).

Adequacy of buildings.

Daily schedule of work.

Membership by subjects (secondary).

Required and elective subjects (secondary).

Length of class periods.

The information which should be available for each school district or local unit of school administration includes:

Name and/or number of district or local unit.

Area in square miles.

Names of all pupils of school census age in school and not in school.

Residence of pupils.

- School which each pupil is attending or should attend.
- Pupils transported at public expense—Elementary and secondary.
- Enrollment, membership, and average daily attendance—Elementary and secondary.
- Number of teaching and supervisory positions—Elementary and secondary.
- Number of administrative positions.
- Assessed valuation and percent that this is of true or market value.
- Tax rate for school purposes—Current expense and bonds and interest.
- Outstanding bonded indebtedness with the amount of principal and interest due each year.
- Other outstanding indebtedness (warrants, etc.).
- Expenditures by items of current expense.
- Salaries for instructional and supervisory personnel—Elementary and secondary.
- Salaries for administrative personnel.
- Transportation costs—Salaries, operation and maintenance, and capital outlay.

It will be helpful to prepare a list of items of information needed so as to show those to be recorded by schools and those by school districts and to show the source (the record or report form) for each item. The form suggested below may be used for preparing such a list:

Data needed by schools and school districts

	To be reported by—		
	Schools	Districts	Forms used ⁴
Alphabetical list of persons of census ages	X (S. C.)		
School census by age groups: ¹			
6-11			
12-14			
15-17		X (S. C.)	
General population by 10-year intervals		X (F)	
Enrollment or membership by grades	X (T)	X (S)	
Enrollment by levels	X (T)	X (S)	
Average daily attendance	X (T)	X (S)	
Pupil-teacher ratio	X	X	
Number of grades or years of work	X (P)	X (S)	
Number of days taught	X (P)		
Number of classroom teachers	X (P)	X (S)	
Instructional salary costs	X		
Assessed valuations		X (F) ²	
Tax rates		X (F) ²	
Financial receipts by amounts and sources		X (F) ²	
Itemized statement of bonded indebtedness		X (F) ²	
Expenditures by classifications		X (F) ²	
Transportation of pupils		X (S) ²	
School plant facilities	X	X (S) ²	

¹ Include all pupils within the school census ages.

² Needed and requested in greater detail.

³ To be reported for additional years.

⁴ Indicate the form or forms where the item appears.

S. C., School census. T., Teacher's record. P., Principal report. S., Superintendent's report. F., Fiscal agent's record.

Tabulations so prepared that for each school and school unit data can be consistently and uniformly reported, should be as simply arranged as possible, limited to one or possibly two series of related facts, and carry clear, concise titles. As already indicated, some will pertain particularly to schools and attendance areas, and others to administrative and fiscal units; some will deal with and reveal status and trends and others will reflect proposals based on the findings of the study. Each tabulation to be included should, of course, be considered in terms of its possible contribution to the narrative report.

A series of suggested forms for collecting and tabulating data is included in the appendix.

Descriptive data.—In order to present a complete and significant picture of the present situation, it will be necessary to have information which will be largely descriptive or definitive in nature. Complete facts, for example, should be available for each unit studied regarding significant physical features; soils and soil conditions, including land use planning maps; minerals, other natural and agricultural resources; transportation and communication; population characteristics; economic status; and significant social, religious, and educational traditions and customs. An outline should be prepared on the basis of which such information can be assembled.

Information as to the method of nominating and appointing, preparing and approving, and/or executing and supervising the following is important:

- Administrative and professional assistants.
- Other employees, including bus drivers.
- Salary schedules for teachers and other employees.
- Salary payments.
- Transportation routes.
- Buildings.
- Program of studies.
- Textbooks.
- Supplies.
- Budgets.
- Tax levies.
- School funds.
- Records.
- Boundaries.

Examples of other information which should be available are:

- Legal provisions for changing boundaries of existing school districts and for creating new districts.
- A clear, concise statement of the powers, duties, and responsibilities of the local school authorities.
- A statement revealing the operating relationships among the several types of local school units.

GRAPHS, CHARTS, AND OTHER ILLUSTRATIONS

Although data basically necessary in the consideration and evaluation of existing educational situations and of consequent proposals should be supplied in tabular form, some situations can be more clearly revealed by

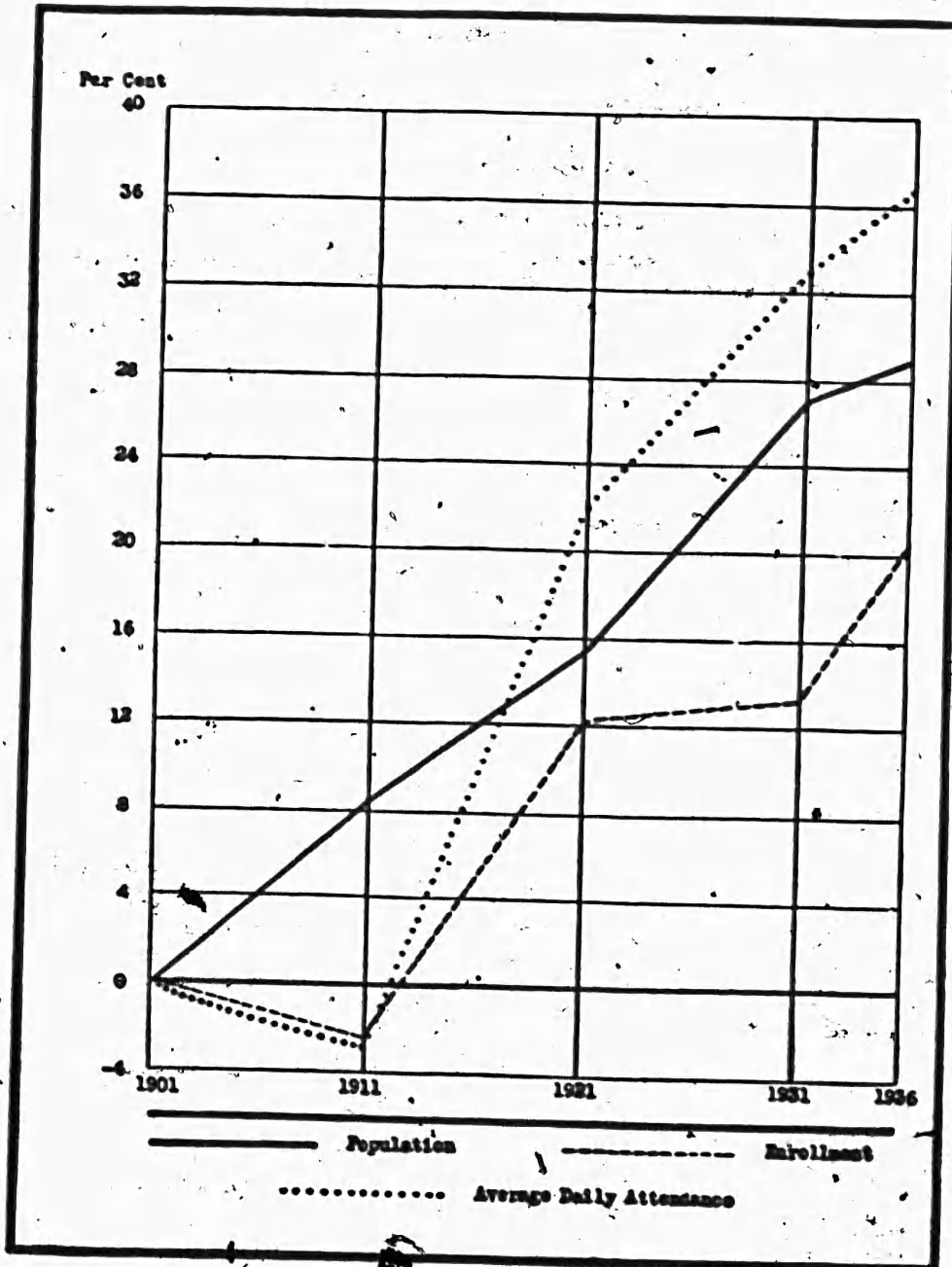


FIGURE 1.—Percent of increase or decrease in population, enrollment, and average daily attendance in Tennessee, 1901-36.

using pictures, graphs, and charts. To point out the differences between two buildings and to assist in showing the advantages of modern construction, pictures may be effectively used to supplement narrative and descrip-

tive statements. A graph such as the following to show change in status of population, school enrollment, and attendance, may be advantageously used to present trends.¹

Improvements in the organization of local school units are, of course, dependent upon existing provisions for changing boundaries. Discussions relating to and involving these provisions will be more meaningful if they are supplemented by a tabulation revealing not only the provisions but indicating the conditions to be met before the designated agents or agencies can exercise their authority and responsibilities. The following tabulation presents legal provisions for changing boundaries of local school administrative units in Arizona, 1936.²

¹ Tennessee. State Department of Education. A Graphic Analysis of Tennessee's Public Elementary and High Schools. Nashville, The Department, 1937, p. 3.

² Alvea-Anderson-Foulkes. Local School Unit Organization in 10 States. Washington, U. S. Government Printing Office, 1938. (Office of Education, Bulletin 1938, No. 10.)

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FIGURE 2.—Legal provisions for changing boundaries of local school administrative units in Arizona, 1936

LOCAL SCHOOL UNITS

By the county superintendent		By the county board of supervisors ¹		On petition		By vote
Under his authority to certify district boundaries between April and July 1 each year	Of parents of 10 children living over 4 miles from a school-house	On petition of 10 or more electors	Of a majority of electors of a district wishing to be annexed and approval of board of adjoining districts. ²	Of two-thirds of the electors of a district		
	1	2	3	4	5	6
Make any changes in boundaries, annexation of districts, or transfer of territory of districts within the county.	Create a new district.	May, at discretion of board, change boundaries of any district.	1. Annex one district to another. 2. Annex common-school district to high-school district.	1. Detach a district from a union high school district. ⁴		1. Form a consolidated district. 2. Form any type-high-school district. ⁵ 3. Form union or county junior college district.
	3	4	5	6	7	8

¹ All boundary changes, other than by majority petition or majority vote, are subject to final approval by the county board of supervisors, whose decisions may not be appealed.
² Whether the county superintendent has any discretion in these cases is not stated.
³ These changes may be nullified by the petition of a majority of the electors of the annexing district if filed within 15 days after the transmittal of the original petition.
⁴ Provided he notifies the boards of the districts affected and gives them opportunity to protest.
⁵ Certain conditions in regard to location of schoolhouse, contiguity of remaining territory, etc., must be fulfilled.
⁶ Except a high-school district coterminous with an elementary district not meeting certain requirements; such a high-school district may be established by the State board of education upon petition of a majority of electors of the district.

In the State report on the study of Local School Units in Ohio, legal provisions for changing school district boundaries are shown in the following chart:³

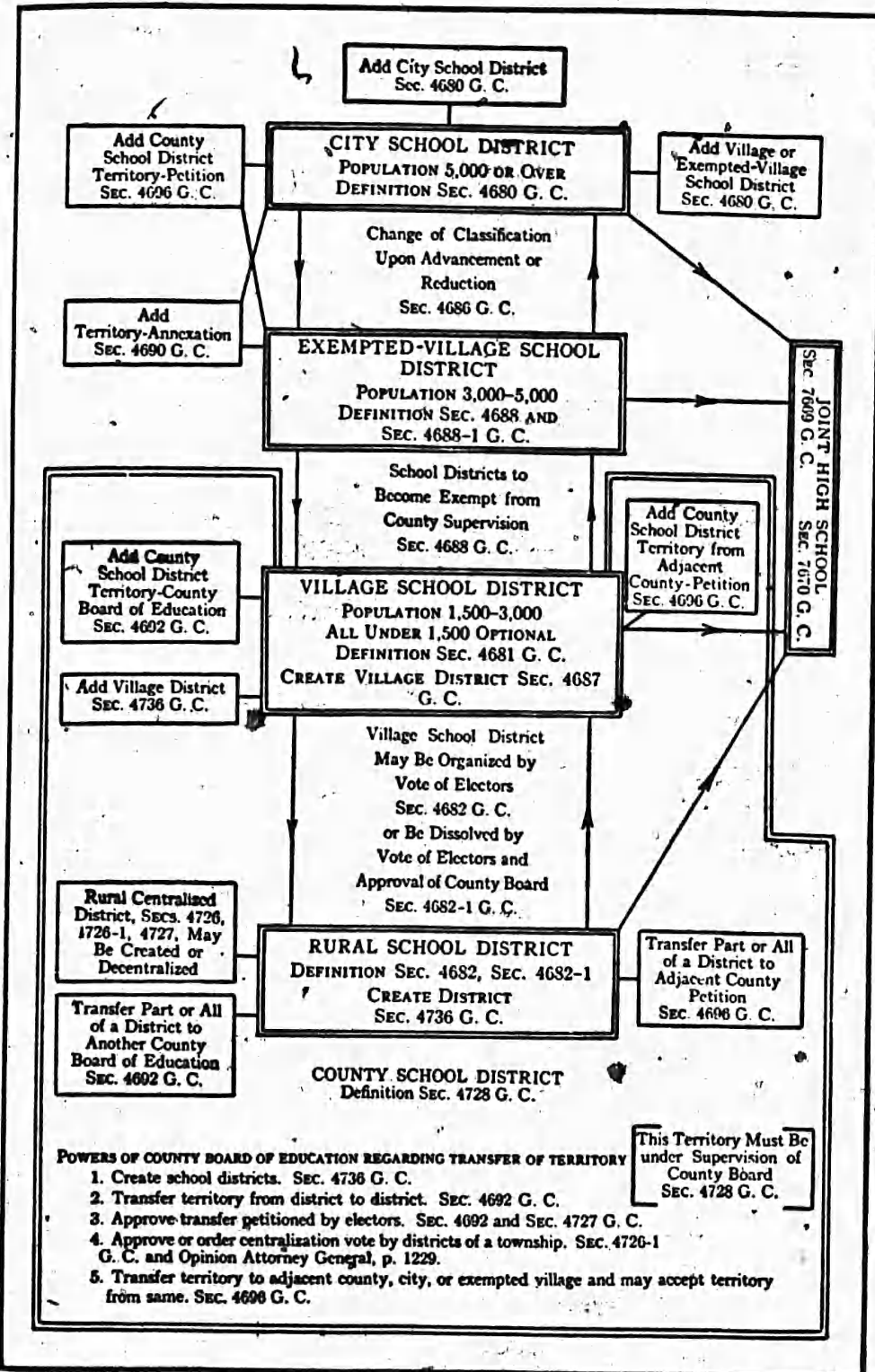


FIGURE 3.—Legal provisions for changing school district boundaries in Ohio, 1937

³ Ohio, State Department of Education, Study of Local School Units, Columbus, The Department 1937, p. 39.

PREPARING A HANDBOOK

A number of States that have been engaged in State-wide or area-wide studies have found it quite helpful to inform individuals participating in the study of all phases of the work involved. A handbook, containing statements of functions, objectives, and standards, as well as forms for collecting, tabulating, and presenting statistical and other information, may be advantageously prepared for this purpose. The Local School Units Project Staff of Ohio prepared such a handbook, in mimeographed form, including:

- General background information, including purposes of the study.
- Sources of funds for State support.
- School organization in the State.
- The advantages of larger school units.
- Legal provisions for reorganization.
- Other topics.
- Suggestions on procedures in preparing county reports.
- Standards and outline for content of report.
- An appendix containing basic items of information on general factors affecting the schools (forms for collecting and tabulating data) and an extensive bibliography.

[CHAPTER VI]

Preparation of Maps

IMPORTANCE OF MAPS

Maps¹ are important in a study of local school units in that they in effect tie together all phases of the work. Reports should be prepared in light of the situations revealed by maps, tables, and charts as well as by any other pertinent information.

There are three major steps involved in preparing effective maps for studies of local school units: The first is to secure a good basic or foundation map which is to be used as a background map for other information or which will serve as a basis for tracings for outlines for maps needed; the second involves the preparation of field maps or what might be termed working maps; and the third involves the preparation of the final maps in such form that they can be effectively used.

Basic maps.—Basic maps should be relatively free from unrelated details. When possible, they should show township, range, and section lines and numbers. In addition, roads and county and other political boundaries significant to the educational program should be shown. Major streams, county boundary lines, roads, and other background features should be shown by a standard code that needs little or no explanation. The same code should be used for all maps. Features on the basic maps which are to be reproduced can readily be made to stand out by tracing the lines in black ink. Information relating to the school program, which is to be reproduced, can also be shown in black ink. If basic maps which are available contain many unrelated details, it may be advisable to prepare an outline map by tracing the desirable basic features. Unless the tracing is to be handled often, tracing paper is satisfactory and less expensive than tracing cloth.

Field maps.—Information may be coded on preliminary or field maps. Locating pupils and school buildings and charting transportation routes and district boundaries on these maps will permit checking and making necessary corrections before transferring the information to the final map.

Final maps.—The preparation of final maps constitutes an exacting responsibility. Neatness and accuracy are indispensable. The number and types of maps to be prepared will depend to a great extent upon the situation in the area being studied. For example, in sparsely populated areas with few schools and relatively large administrative units, fewer maps will be required than in densely populated areas with many schools and small

¹ Sources of maps are given in bibliography.

administrative units. The maps that are prepared should reveal: (1) The existing school and district situations, (2) the distribution of the school population, (3) the school transportation routes, (4) the status of school buildings and sites, and (5) the proposals for reorganization.

Each map should carry a short but significant title such as "School Population Map," should be identified with the area represented, and should carry an appropriate legend.

The school information presented should be classified to show groupings of related items. For example, on a school transportation map, all items regarding the number and identification of routes may be carried under the heading "routes." Items relating to the conditions of roads may be grouped as follows:

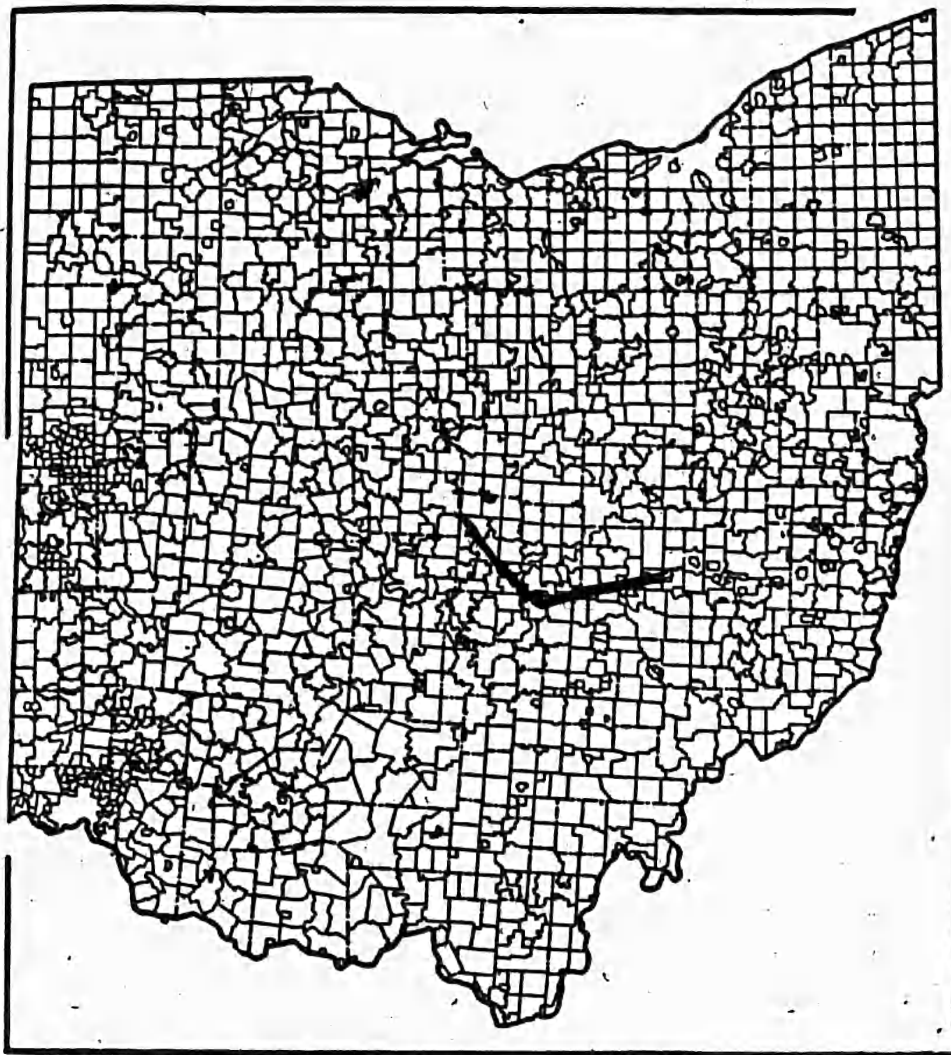
<i>Type</i>	<i>Roads</i>	<i>Condition</i>
Hard surfaced.		Narrow.
Gravel or chert.		Slippery in wet weather.
Sand clay or top soil.		Not suitable for transportation.
Graded.		
Unimproved.		

Symbols used should be simple, few in number, and carefully worked out in advance. The size of each symbol (or letter) should be in proportion to the size of the map and should be large enough to be legible on the reproductions.

MAPS FOR PRESENTING SCHOOL INFORMATION

The maps referred to below will be helpful in presenting and interpreting information directly involving the school program in the area studied.

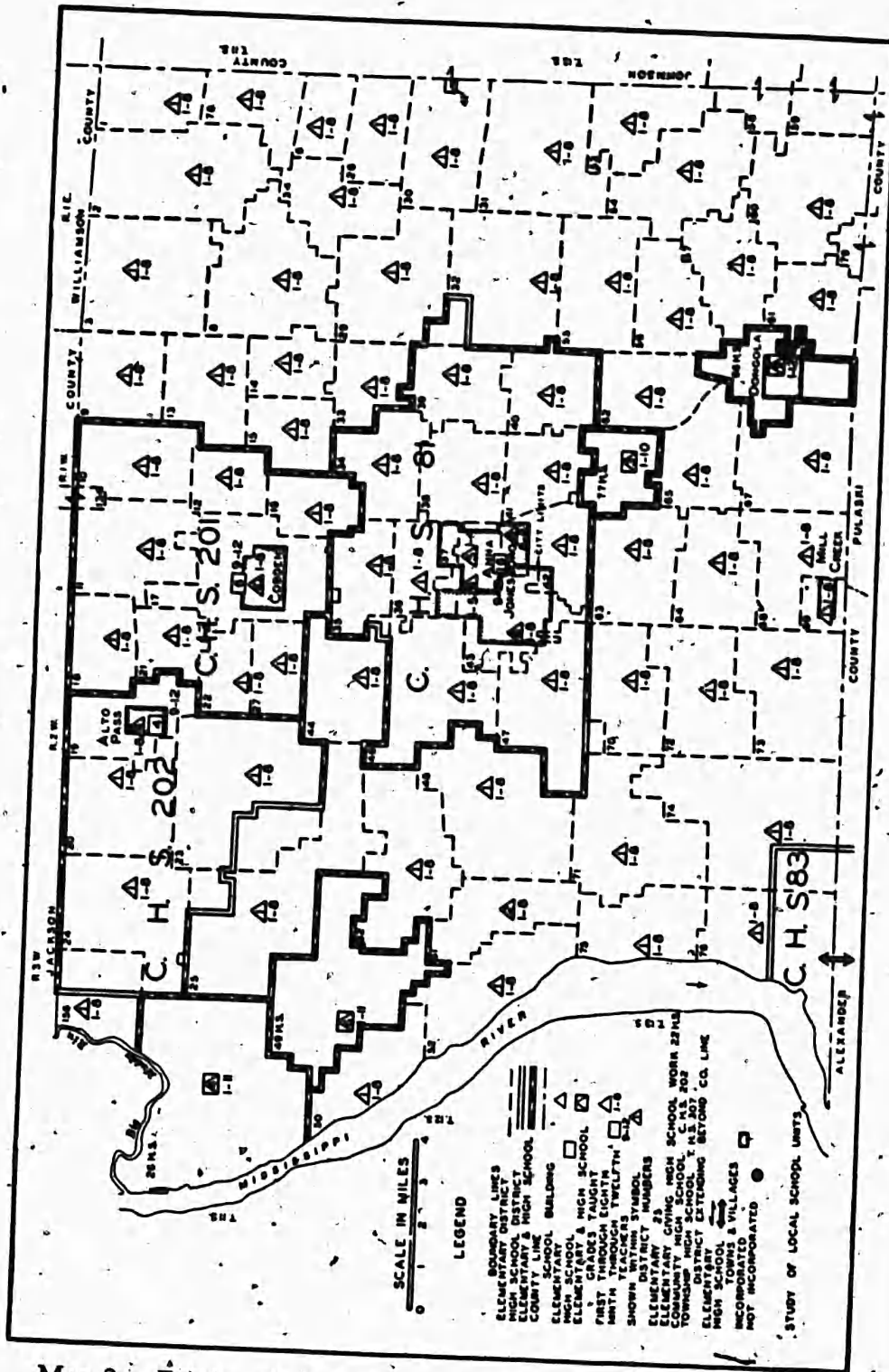
School district map.—At least the following information should be included:



MAP 1.—Ohio school districts, 1936.

This map was prepared by the Ohio State Planning Board from county spot maps furnished by the Ohio Local School Units Project.

School districts and boundaries.—A single narrow line, thus ———, may be used to show district boundaries. The name and/or number of the district can be printed in the area included in the district. Types of districts may be represented by different symbols and by cross-hatching. The accompanying illustration, showing the school districts and schools in one county in Illinois, presents one of the most com-



MAP 2.—Existing school district organization, Union County, Ill., 1936.

plicated district situations in the United States. (Districts extending into other counties are indicated by symbols placed across the county boundary line along the area affected.)

Location of schools.—Each school should be accurately located, using land description if possible. Information revealing the type and size of school should be recorded. The following symbols may be used to indicate elementary and secondary schools. (The small black triangle in each symbol shows exact location of the school.)



Building carrying any combination (beginning with first grade) of grades 1 to 8, inclusive.



Building carrying any combination of grades 7 to 12, inclusive.

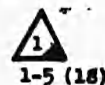


Building carrying any combination of grades 1 to 12, inclusive, except buildings carrying combinations indicated by the two symbols immediately preceding. (This symbol is used to indicate buildings having both elementary and high school grades.)

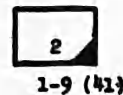
Separate schools for Negroes may be designated by the letter "N" just above the symbol.

The number of teachers may be shown by a figure or figures inside the symbol for the school, and the number of grades taught by a figure or figures beneath this symbol. The number of pupils can be placed in parentheses following the grades taught. (See examples below.)

A 1-teacher 5-grade school building with 18 pupils would be indicated.....

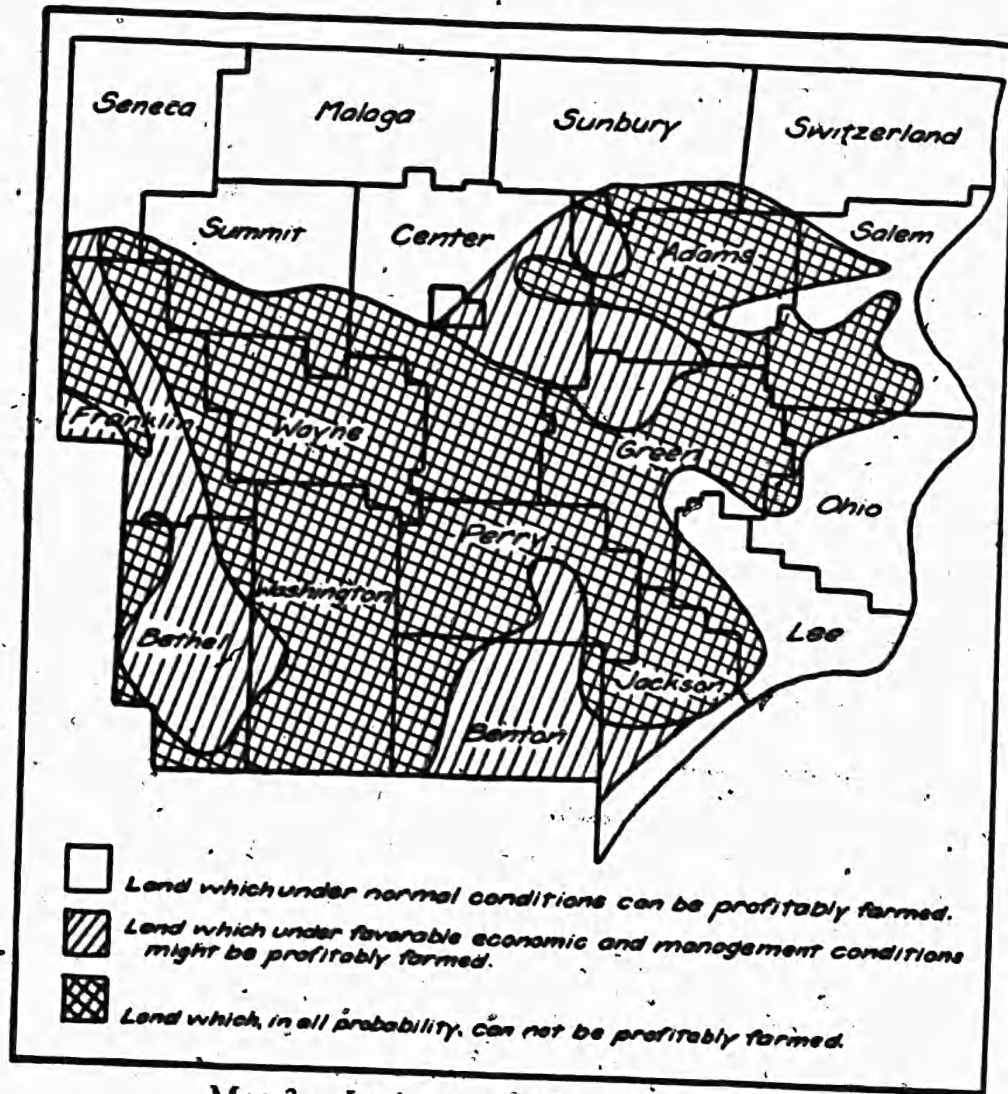


A 2-teacher 9-grade school building with 41 pupils would be indicated.....



A 10-teacher school building of grades 7 to 12, inclusive, with 275 pupils would be indicated.....





MAP 3.—Land use map, Monroe County, Ohio.

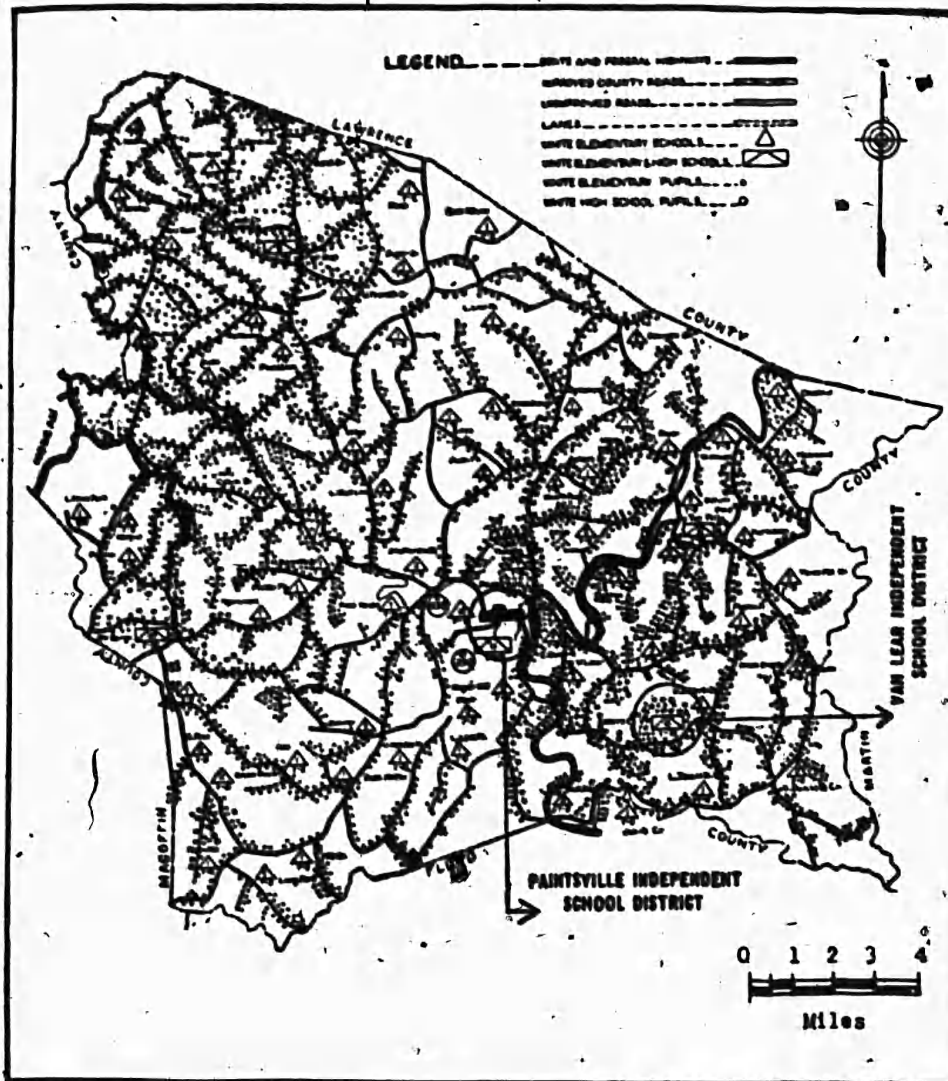
The following symbols may be used to identify elementary, junior, and senior high schools:

- Building carrying grades 1-6, inclusive.
- Building carrying grades 7-9, inclusive.
- Building carrying grades 10-12, inclusive.
- Building carrying grades 7-12, inclusive.

The number of teachers, the number of grades taught, and the number of pupils may be indicated as previously suggested.

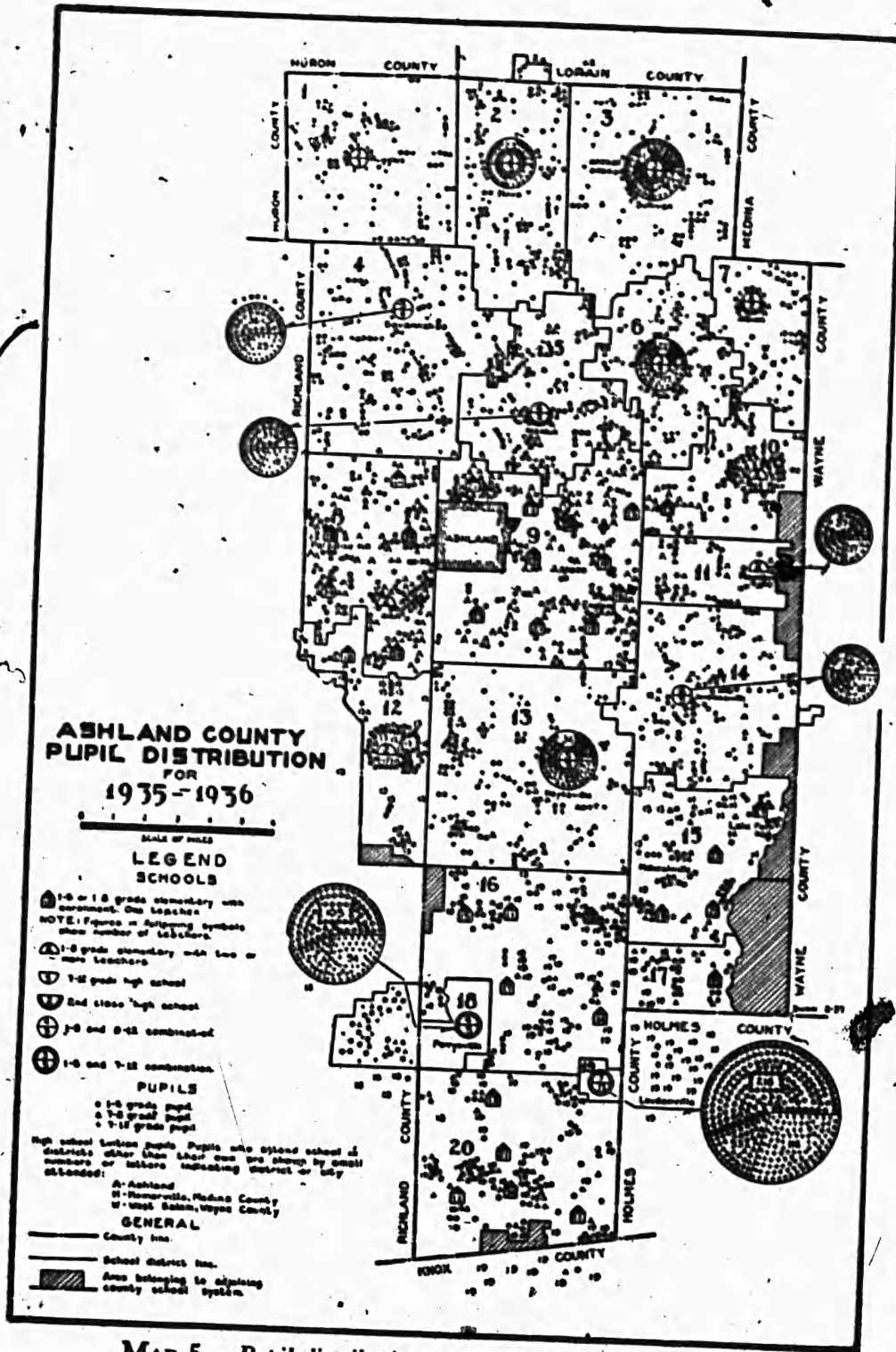
School population maps.—At least the following information should be included:

Location of pupils.—Pupils may be located by land descriptions in



MAP 4.—Pupil distribution, Johnson County, Ky., 1936.

areas and States in which the rectangular survey has been used. If a pupil is located in the NE one-fourth of the SE one-fourth of Section 24, Township 3N, Range 2E, the error of the location of the symbol representing the pupil on the map cannot exceed one quarter of a mile.



MAP 5.—Pupil distribution, Ashland County, Ohio, 1936.

The following symbols are suggested for locating the pupils by age groups representing approximately the ages for the three levels indicated:

Pupils attending public schools.—

- Elementary (ages 6-12, inclusive).
- ▲ Junior high school (ages 13-15, inclusive).
- Senior high school (ages 16-18, inclusive).

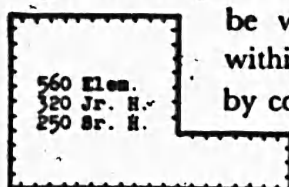
Pupils attending non-public schools.—

- Elementary.
- △ Junior high school.
- Senior high school.

Pupils of school age not attending school.—

- ① Elementary.
- ▲ Junior high school.
- Senior high school.

In the congested urban areas, the following plan may be used for locating pupils. The boundaries of an incorporated city, shown as part of the county, may be shown by solid lines, the area which is inside and adjacent being shaded. The number of pupils may

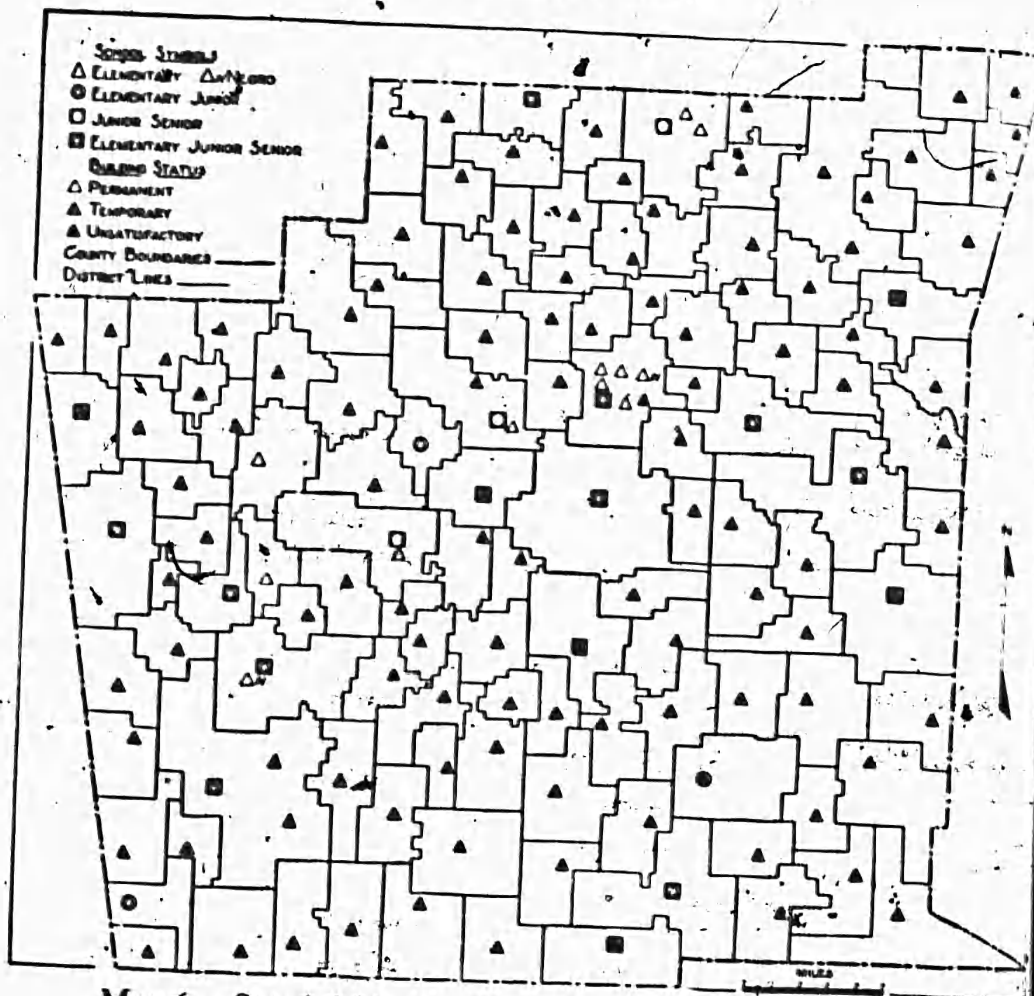


be written in the unshaded area within the boundaries or shown by code on the margin of the map.



In a densely populated area, not an incorporated city, the number of pupils can be written in a circle, drawn to include the approximate area.

Location of schools.—All schools should be located, giving kind, number of teachers, etc., and using the symbols recommended under *school district maps*.



MAP 6.—Status of school buildings, Washington County, Ark., 1936.

Status of school buildings and sites.—When desirable, maps to show the status of school buildings and sites may be effectively developed by using the following symbols:

Buildings:



Should be abandoned at once.



Suitable for temporary use.



Suitable for permanent retention.

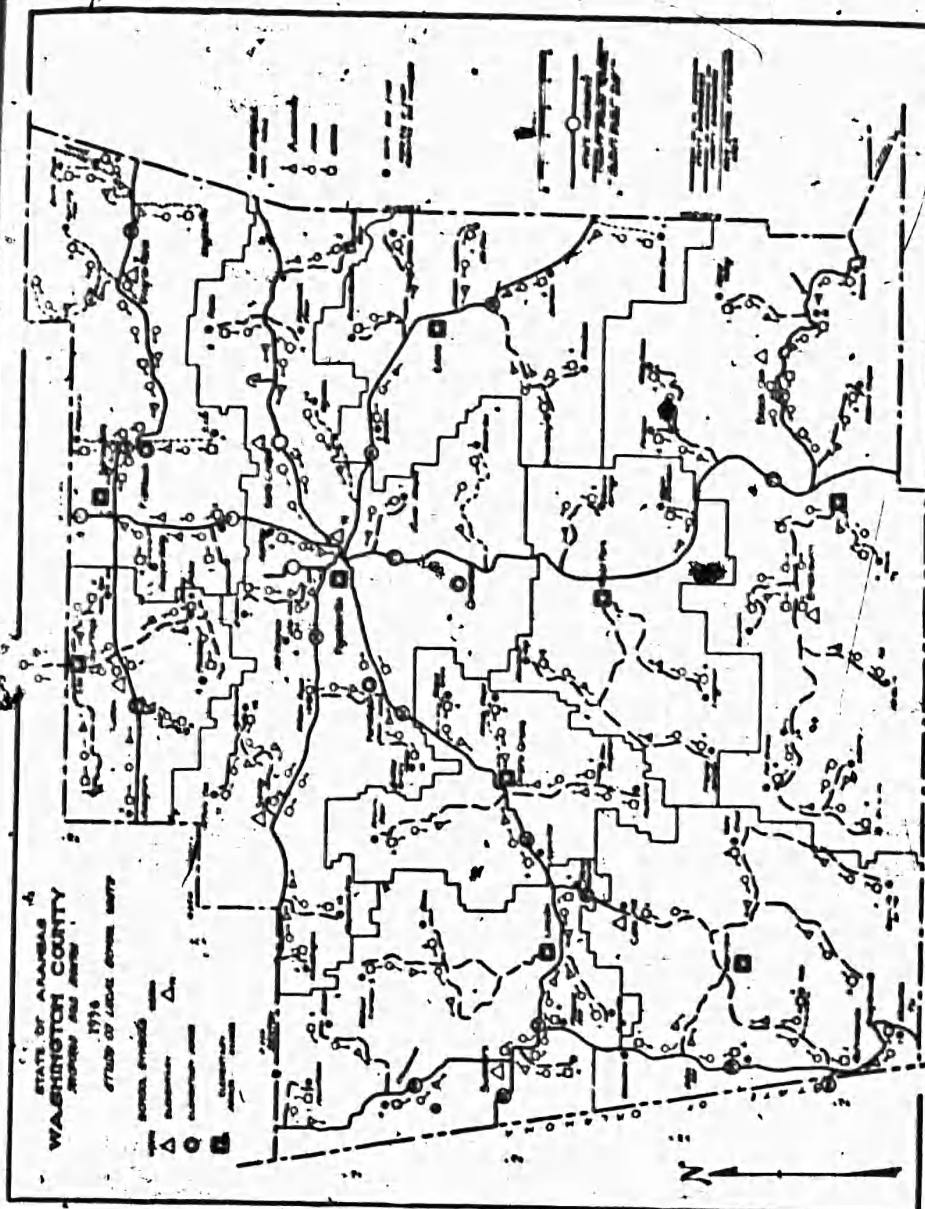
Sites:



School transportation route map.—If there are few school transportation routes, they can probably be shown on the school population map without involving too much detail. If, however, transportation has been extensively developed, a separate map will be desirable to present the actual situation. Each school should be located by name, each route identified, and conditions indicated. The following plan may be used:

Identification of routes.—Each school may be designated by a capital letter and each route from that school numbered. The five routes to

the school, designated by the letter A (can be shown on the margin of the map), would be numbered A1, A2, A3, A4, and A5, respectively. If two trips are made each morning or evening by the bus over route A5,

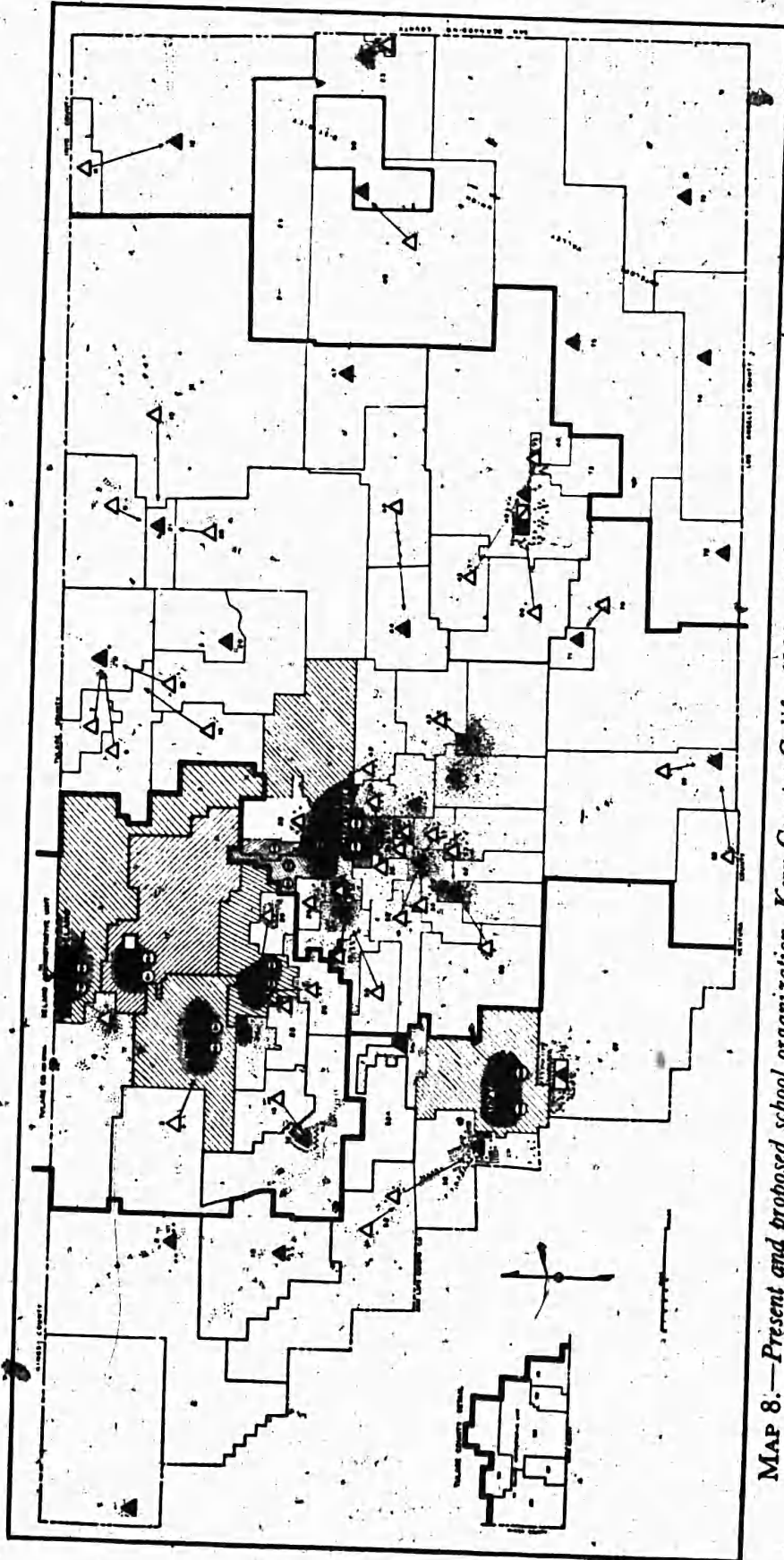


these can be indicated A5-a and A5-b. Arrows will show the direction of travel.

Road conditions.—The following code can be used to show types of roads traveled by buses.

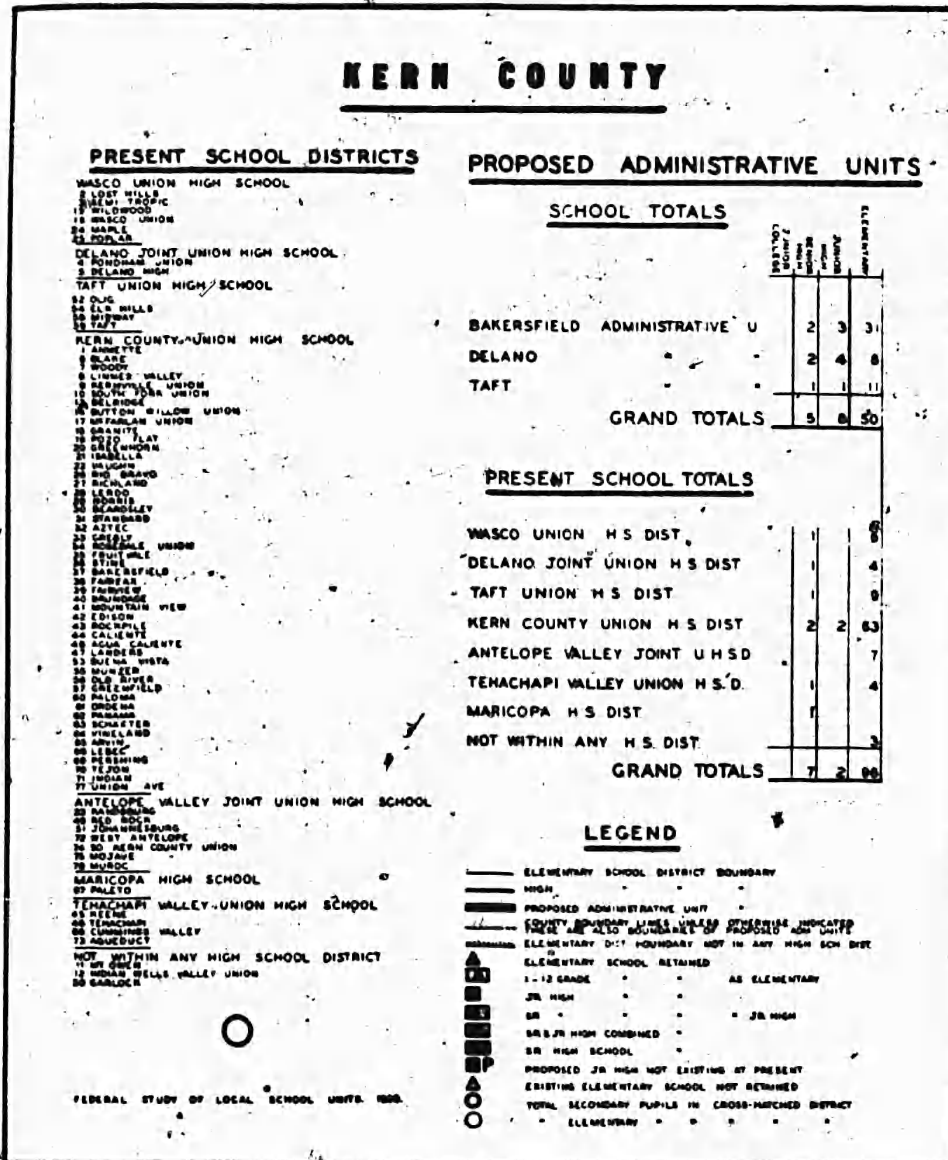
Type of road:

- Hard surfaced.
- Gravel or chert.
- Sand clay or top soil.
- Graded.
- Unimproved.



MAP 8.—Present and proposed school organization, Kern County, Calif., 1936. (See page 57 for explanations and symbols.)

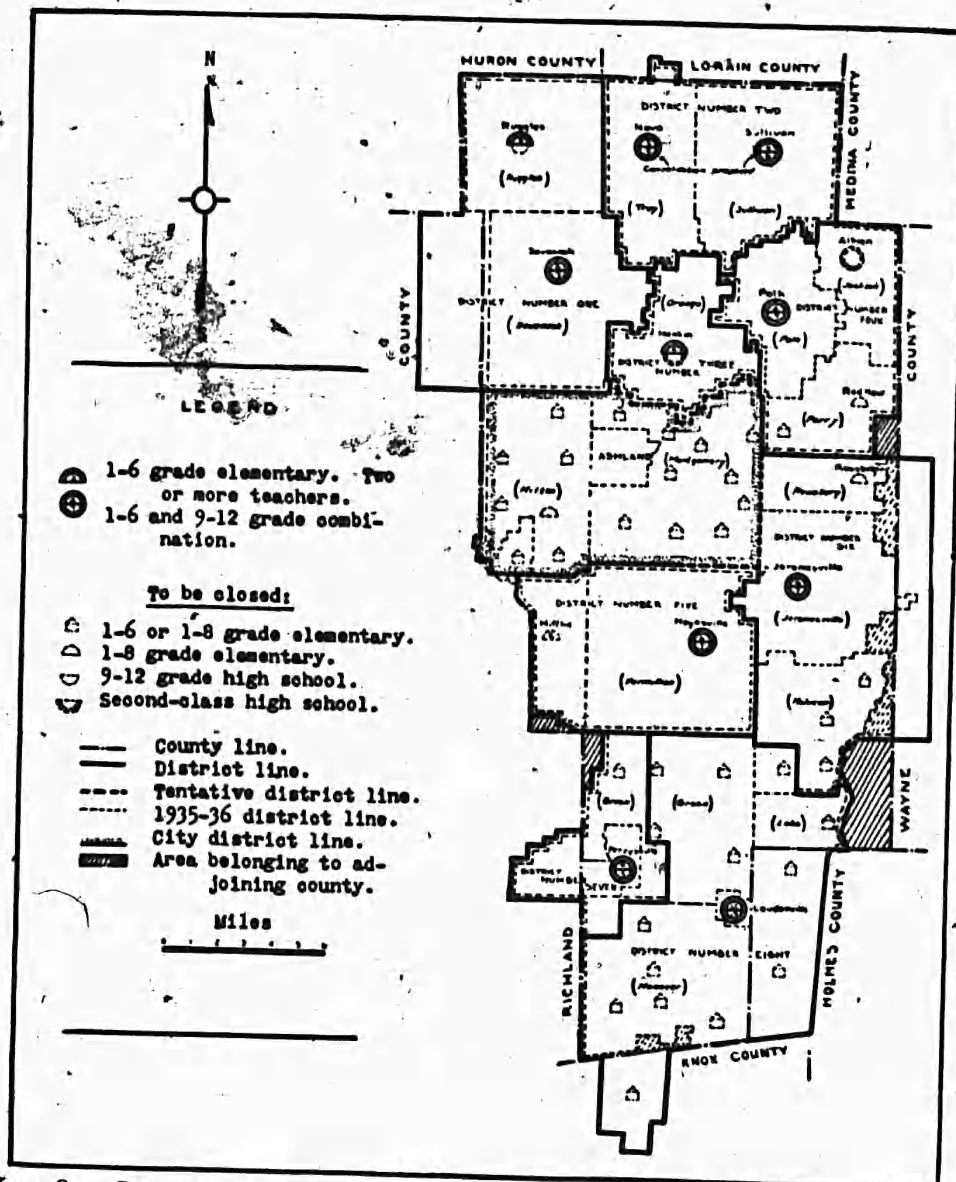
Proposed school program.—Symbols designating permanent elementary, junior high, and senior high school locations should be larger and heavier than those marking location of existing schools. Those to be abandoned immediately and those to be retained temporarily may be designated by



Explanations and symbols for Map 8.

other modifications of these symbols. Boundaries of proposed administrative units may be identified by heavy lines.

The types and condition of roads to be used for transporting pupils from a school to be abandoned to another school should be shown. The direction of transfer of pupils may be indicated by arrows pointing to schools (elementary, junior, and senior) to which pupils are assigned.



MAP 9.—Present and proposed school organization, Ashland County, Ohio, 1936.

MAPS FOR PRESENTING IMPORTANT RELATED INFORMATION

Land use planning maps.—If available soil classification maps are too technical or too detailed, a simpler classification, such as the following, may be preferable:

- ▨ Poor agricultural land.
- ▨ Fair agricultural land.
- ▨ Good agricultural land.

Swamp or marsh lands, lands subject to overflow, lands suitable for special crops, etc., may be designated.

Topographical or contour maps.—These will be helpful in preparing other maps and in interpreting land use planning maps, school population maps, and those presenting existing conditions.

Other maps.—Maps revealing community and trade areas, crop productivity in terms of yield or value per acre, tenancy and ownership of farms with size of farms, urban building saturation, wealth per census child, etc., may be found very helpful.

REPRODUCING MAPS

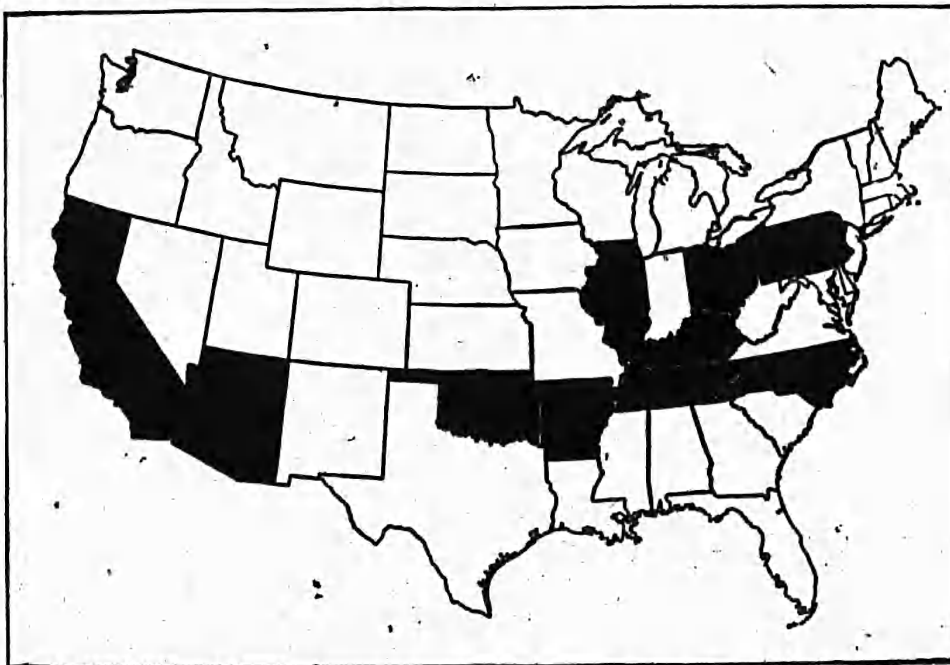
To assure reproduction at a reasonable cost, maps should be selected and prepared in relationship to the possibility of reproductions. The process of reproduction is largely determined by the number, size, and kind of reproduced maps desired. Ideally, reproduced maps should fit into the printed, or mimeographed, report without having to be folded. An almost unlimited number of blue- or black-line prints of the same size can be made from the copy prepared either on tracing paper or tracing cloth.

If maps are being reproduced (and probably reduced in size) for inclusion in reports or for distribution to school officials, one of the following procedures may be used:

Photostating.—This is satisfactory for reproducing a limited number of copies of a map. It is too expensive when many copies are needed.

Planographing, multilithing, etc.—A number of processes, as planographing and multilithing, similar in many respects, can be effectively used for reproducing, at a reasonable cost, maps in large quantities. Since cost increases with the increase in the size of the reproduced map, maps should be prepared so that the reproduction to be included in the final report will be legible.

Line cuts.—If the report of the study is to be printed, it may be necessary to have line cuts made. This process will be more expensive than the processes listed above unless a large number of copies are to be printed.



MAP 10.—States participating in Local School Units Projects:

Presenting and Evaluating the Present Situation

ASSEMBLING DATA

Many data will have to be collected or assembled in the local school unit. As previously indicated, this phase of the work may be done by local school teachers and officials under the general supervision of the central staff. Generally, calculations involving derived data can be carried on to advantage in the central office where machine facilities are available and where data can be closely supervised.

Some of the data will be used as collected, while some will, of necessity, have to be rearranged to be most effective. It is necessary and important to have such basic information as school enrollments by grades collected from the several units. However, facts derived from the reports, as for example, number and percentage of pupils enrolled according to number of teachers, number and percentage of pupils enrolled according to length of term, and grade distribution according to size of schools are also significant. If possible and desirable, derived data can be prepared in the locality where the basic information is collected.

INTERPRETING DATA

Correct evaluation will be possible only when all data are properly and systematically organized. This means that the facts should be classified whenever practicable not only according to the type of local school unit being studied but according to proposed standards. When properly organized, the information will be serviceable for systematically presenting status as well as for evaluating existing situations.

Since services, costs, and size are factors which enter into statements of standards, data should be organized so that these factors can be evaluated. For example, it should be possible to study schools according to size as well as according to services and facilities provided. School population maps, school transportation route maps, land use maps, and maps showing existing local unit organizations and present status of school buildings should be closely studied and analyzed.

The staff should be satisfied only when existing conditions have been so fully explained and interpreted that residents of the unit concerned will appreciate the fairness and understand the significance of the evaluation. To do this it becomes necessary that the data pertaining to attendance areas

be separately considered and yet presented in proper relationship to data relating to local administrative and fiscal units.

PRESENTING AND EVALUATING DATA RELATING TO ATTENDANCE AREAS

The following outline is suggested for presenting and evaluating situations relating to attendance areas in a district or county being studied:

I. FACTORS AND CONDITIONS IN THE COUNTY THAT ARE RELATED TO THE ACTUAL AND POTENTIAL EDUCATIONAL PROGRAM

In this section of the report the staff should attempt to bring out clearly those factors that have or are likely to have significant bearing on the educational program and particularly on attendance areas. Care should be exercised to avoid making this part of the report merely a narration of facts that may be interesting but not necessarily significant for the educational program. In other words, the objective of this section of the report should be to show where children now live and are likely to live, what resources there are now and are likely to be, and what handicaps will probably be encountered in connection with the development of satisfactory attendance areas.

- (1) *Significant physical features of the county.*—Give the location and state the significance of any large streams, any topographical features, including mountains and other natural barriers that divide communities, or are likely to influence the development of attendance areas in any other way.
- (2) *Soils and soil conditions.*—Describe and locate areas or regions well adapted to agriculture because of fertile soil; areas not well adapted because of poor soil, etc. Areas in timber and areas set aside or likely to be set aside for reforestation or as reserves of any type should be considered. (Use here any maps classifying soil as to suitability for agriculture, etc.)
- (3) *Minerals and other natural resources, if any.*—Show location of and describe probable developments and trends. For example, if rich coal deposits underlie a certain section of the county and if these deposits have not yet been developed, there is a strong likelihood that the development of the deposits at a later date will have considerable bearing on the development of attendance areas.
- (4) *Transportation and communication.*—Explain what railroads, through highways, and other means of communication facilitate the development of the school program and particularly of satisfactory attendance areas, or explain where the lack of such means of communication constitutes handicaps. The present road system and any roads that are likely to be developed should be explained in relation to the program. Any handicaps because of poor roads, lack of roads, or unfavorable weather conditions should be noted.
- (5) *Population.*—Show significant population centers and trends; also any trends in school population. Any significant variations or trends, by areas, by urban or rural population that have occurred during recent years should be indicated. Give predictions of probable future trends with necessary tables and data.

- (6) *Economic status.*—Explain the probable effect of any prominent industries and industrial or occupational trends on the planning of the school program. For example, the development of mining in some areas just a few miles from a good agricultural section may have significant bearing on attendance areas in that region. Care needs to be exercised to avoid assuming trends that do not exist. The status and development of agriculture, including the relative number of farm tenants and other related factors, may be of significance in certain areas.
- (7) *Significant social, religious, and educational traditions and customs.*—Explain any significant differences or trends that exist. Care should be exercised to avoid assuming differences to be significant when they may not be. For example, the 1-teacher school tradition may prove to be of very little significance in a community when roads are developed and people have an opportunity to see how their children will benefit from attending larger schools where better opportunities can be provided.

II. PRESENT SCHOOL ATTENDANCE AREAS

This section should present as clearly as possible a picture of the present status of schools, including an explanation of any handicaps that arise because of the present situation.

- (1) *Location of schools.*—Show location of schools¹ and size² of schools in the county. Present here any data showing duplication of or overlapping in attendance areas. Spot maps showing location of elementary, junior, and senior high schools, number of pupils, number of teachers in each school, and the distribution of school population should be presented and interpreted. The present status of attendance areas may be presented as follows for the organization indicated:
- (a) Location and size of schools offering work on the elementary level.
 - (b) Location and size of schools offering work on the elementary-junior high school levels.
 - (c) Location and size of schools offering work on the elementary-junior-senior high school levels.
- (2) *Present facilities:*
- (a) Teachers: Include training, experience, tenure, etc., of elementary, junior, and senior high school teachers.
 - (b) Curricula: Describe offerings in schools of various types bringing out any limitations that may exist, particularly those affected by the status of the administrative unit.
 - (c) Extracurricular activities: Indicate what activities are carried on and the number of pupils affected.
- (3) *Evaluation of schools.*—Give here any data constituting a basis for evaluation and also the evaluation of work being done by sizes and types of schools. Include such items as length of term by size of school, number of pupils per teacher by size of school, proportion of children of school age in school by size of school, percent of pupils enrolled in each grade, school attainment of pupils who have dropped

¹ By land description if possible.

² Both in terms of number of pupils and teachers.

out of school, and number of schools meeting satisfactory standards as to size. Outstanding features of the present school setup, such as community interest and activities centered in local schools, outstanding instructional programs and achievements in certain districts or schools should be presented.

- (4) *Deficiencies of present attendance areas.*—Show how and why present school attendance areas do not meet the minimum standards adopted. It may also be found desirable to show in what respects the schools fail to meet the needs of community life and their failure to provide adequate instructional programs.
- (5) *Transportation.*—Give data regarding present school transportation facilities. Include number of pupils transported to elementary, junior, and senior high schools of various sizes, length of transportation routes, cost per pupil and other significant items. A map showing location of schools and location and condition of transportation routes will be helpful.

III. PRESENT SCHOOL BUILDINGS AND SITES

This section of the report should present data bearing on the present status of school buildings and sites. A very effective map may be prepared showing status as explained under (1) and (3) below:

- (1) *Classification of buildings.*—Buildings should be grouped by size of school (number of teachers), type of school (elementary school, elementary-junior high school, or elementary-junior-senior high school), and classified as: (a) suitable for permanent retention; (b) suitable for temporary use (not to exceed 10 years); and (c) buildings which should be abandoned or replaced at once. The fact that a building is suitable for use over a long period of time does not necessarily mean that it is to be recommended as a school center in the proposed program.
- (2) *Adequacy of buildings.*—Include data and discussions reflecting building construction and condition of buildings, service systems, special rooms, and classrooms.
- (3) *Adequacy of school sites.*—Give here any data on the present status of school sites. For example, sites might be classified as: (a) not suitable for use; (b) might be made suitable by changes (such as additions, grading, etc.); and (c) suitable.

As data have been assembled in all local units it will be advisable to summarize data and evaluate the situation in the State as a whole. Particular emphasis should be placed on evaluation of present status and on the advantages and disadvantages in terms of services for the children. The following outline is suggested for guidance in presenting these materials in the form of a State summary:

1. *Elementary schools*

- (a) *Characterization.* Give outstanding and distinguishing features of present elementary schools. Show any duplication and overlapping of areas and services.
- (b) *Curricular offerings.* Give examples of curricular and extra-curricular activities for small and large schools.

- (c) Time schedules. Present typical schedules for small and large schools, showing amount of teachers' time devoted to pupils in any grade.
- (d) Tables, charts, and interpretations. A number of significant tables and charts with accompanying interpretations should be included. The following tables and charts, considered essential, should be arranged by counties, exclusive of cities of 2,500 or more population, and by cities of 2,500 or more. Supplementary tables and charts will undoubtedly be found desirable in most States.
- (1) Elementary (and high) school enrollment and attendance in schools according to number of teachers.
 - (2) Number and percentage of pupils enrolled, according to number of teachers.
 - (3) Number and percentage of pupils enrolled in schools according to length of term.
 - (4) Grade distribution of pupils by number and percentages, arranged by schools having indicated number of teachers.
 - (5) Number of 1-, 2-, and 3-teacher schools by enrollment and grades taught.
 - (6) Number and percentage of schools, teachers, and pupils enrolled in school, according to length of term for all 1-teacher schools.
 - (7) Training of elementary (and high) school teachers in schools, according to number of teachers.
 - (8) Experience and tenure of elementary (and high) school teachers in schools, according to number of teachers.
 - (9) Monthly salaries of elementary (and high) school teachers in schools, according to number of teachers.
 - (10) Number and percent of pupils accommodated in classrooms suitable for (1) permanent use, (2) temporary use, and (3) to be abandoned.
 - (11) Number and percent of elementary (and high) school pupils transported to schools, according to number of teachers.
 - (12) Instructional costs per elementary (and high) school pupil per day in schools, according to number of teachers.
- (e) Maps. Present and explain maps for counties which show striking situations such as a large number of 1-teacher schools, marked progress in developing larger schools, status of buildings, etc.
- (f) Summary and conclusions. Give a critical evaluation revealing strengths and weaknesses and show reasons for variations above and below minimum standards proposed.

PRESENTING AND EVALUATING DATA RELATING TO ADMINISTRATIVE UNITS

The following outline is suggested for presenting and evaluating situations relating to administrative units in a given area:

I. FACTORS AND CONDITIONS RELATED TO PRESENT AND POTENTIAL ADMINISTRATIVE UNITS

This section should present a clear-cut picture, including necessary descriptions and factual data, of the factors and conditions related to the organization of administrative units. While the outline suggested is similar to that for the section on attendance areas, the points of emphasis will differ.

- (1) *Areas selected for the report.*—Give a brief description to identify the area selected and reasons for including it in the study.
- (2) *Topography.*—Identify and describe the significant physical features of the area, such as mountains, large streams, and other natural barriers which tend to act as determining factors in connection with the organization of administrative units.
- (3) *Population centers and density in various sections of the area.*—Present status as well as probable trends and the significance of such trends for the organization of administrative units should be carefully presented.
- (4) *Facilities for communication with each population center.*—Call attention to the status of present facilities. A discussion of present and potential roads and highways should be of significance.
- (5) *Economic status and trends.*—Include a general analysis of the economic status of the area as related to the possibility of supporting the educational program. Industrial and occupational status and trends should be brought out when these are of significance for planning a reorganization of administrative units. Such factors as income, per capita wealth, assessed valuation, and the ratio of assessed valuation to true valuation, and trends in assessed valuation should be presented.
- (6) *Significant traditions and customs.*—Call attention to practices and customs likely to interfere with or to facilitate reorganization. Social and religious differences, the present location of rural churches and trade centers, and the reluctance to send farm and village children to the same school may be significant.

II. PRESENT STATUS OF THE ADMINISTRATIVE UNITS

This section should present analyses of various aspects of the status of each administrative unit. Any data bearing on the financial status or ability of the units should be presented in connection with the section dealing with finance.

- (1) *Area, density, etc.*—For each existing administrative unit give such facts with desirable accompanying interpretations as the following:
 - (a) Area in square miles and density of total population and of school population, with special attention to densities outside incorporated cities and towns.
 - (b) Number of present attendance areas of each type, that is, elementary school, elementary-junior high school, and elementary-junior-senior high school areas, by number of pupils, number of teachers, and average number of pupils per teacher.

- (2) *Personnel.*—Include under this heading the administrative and supervisory personnel and assistants. If any employees serve several administrative units, explain the administrative plan and indicate approximately the time received from the administrative and supervisory personnel by each administrative unit involved. Give the number, salaries, experience, and other significant facts concerning these employees.

When data are available regarding all local school units in the State, the following outline may be followed in presenting them:

LOCAL SCHOOL ADMINISTRATIVE UNITS

1. *Types of administrative units.*—Name and define types of existing administrative units and the distinguishing features for each type. Charts or tables may be very effectively used in presenting the characteristics of each type.
2. *Tables and diagrams.*—Information should be presented, where possible, by type of administrative unit and by State summaries in tables and charts arranged so that comparisons may be made among local units as well as among States. These data may be tabulated to reveal the following and other situations:
 - (a) Number of administrative units, by type, according to area.
 - (b) Number of administrative units, by type, according to number of pupils enrolled.
 - (c) Number of administrative units, by number of pupils enrolled.
 - (d) Number of administrative units, by type, according to number of teachers.
 - (e) Number of administrative units, by type, according to assessed wealth per school census child.
 - (f) Number of administrative units, by type, according to unit current expense costs per pupil in average daily attendance.
 - (g) Number of administrative units, by type, according to average monthly salaries paid elementary, high, and elementary-high school teachers.
 - (h) Number of administrative units, by type, according to training of elementary, high, and elementary and high school (total) teachers.
3. *Services provided.*—Present charts or diagrams showing services provided or services lacking, by types of administrative units.
4. *Maps.*—Present and explain maps for any counties which show unusually satisfactory or unsatisfactory situations with reference to present status. Explain significance of such developments for the school program.
5. *Summary and conclusions regarding administrative units.*—Present careful and critical evaluation of present status of local school administrative units, showing respects in which present units fall below or come above minimum standards proposed, and give reasons.

PRESENTING AND EVALUATING DATA RELATING TO FISCAL UNITS

Only where fiscal units differ from administrative units will it be necessary to present and evaluate data relating to these fiscal units separate

from data relating to administrative units. Where they are identical, these materials should be presented in the preceding section.

The following outline is suggested:

I. FINANCIAL DATA

This section should present an analysis showing financial status of present units and relative financial ability of present and proposed units to carry on the educational program.

(1) *Present administrative units.*

- (a) Assessed valuation per pupil: Give status and trends explaining significance.
- (b) Tax rates: Give present rates for current expenses and debt service pointing out recent significant changes.
- (c) Analysis of receipts: Give amounts and percentages derived from each major source and show trends.
- (d) Analysis of expenditures: Give amounts and percentages devoted to each of the major items and show trends.
- (e) Indebtedness: Give amount of indebtedness and schedule of payments of principal and interest.
- (f) Summary: Give any significant limitations, trends, or problems related to financial status of each of the administrative units.

When data are available for the State relating to fiscal units, they may be summarized and presented as follows:

SIGNIFICANT DEVELOPMENTS IN LOCAL SCHOOL FINANCE DURING RECENT YEARS.

This section should include a brief statement setting forth clearly and logically the significant developments and changes in local school finance during recent years.³ Among the items to be considered are the following:

1. The local unit for support.
2. Ratio of assessed to real value of property.
3. Laws relating to property taxes, including rate limitations, earmarking, etc., of (a) county taxes and (b) taxes levied by independent school districts.
4. New sources of revenue for schools in (a) counties, (b) independent districts.
5. Minimum or maximum financial requirements of the State for school purposes.
6. Budgetary procedures of boards of education. Include particularly any limitations on expenditures.
7. Tendency of local school units to vote additional taxes or discontinue taxes for school purposes.
8. Tendency to expand or earmark tax levies for other functions than schools.
9. Changes for special classes or groups of districts.
10. Other significant changes or tendencies.

ASSESSED AND REAL VALUE OF PROPERTY.

Include here any facts having significant bearing on assessed valuation as related to local school support, such as:

1. Method of making assessments on which local school tax levies are based.

³ Approximately the last 10 years.

2. Variations, if any, in assessments for school purposes and for other purposes.
3. Ratio between assessed valuation and actual valuation of the property. Present data to show the existing ratio between assessed and real valuations and to indicate variations in ratio for different classes of property and in different sections of the State. Use estimates, if necessary.

SCHOOL SUPPORT AUTHORIZED OR PROVIDED ON A COUNTY-WIDE BASIS

This section should present discussions and explanations of revenues authorized or provided on a county-wide basis. (Any taxes authorized or collected by the county for the State or any taxes authorized or collected by the county specifically for independent districts or sub-districts within the county should not be included in this section.) Include taxes levied on real estate or other general property, fees, fines, and revenues from all other sources from a county-wide basis for the public schools as a whole or for any certain grades thereof.

1. *County-wide property taxes and tax levies for school purposes:*
 - (a) *Required rate for participating in the State equalization or minimum program:* If the State laws require that certain tax levies be made or a certain amount per pupil be raised before the schools in the county or a district within the county receive State funds, state the nature of the requirement, give the tax rate, and list any counties that are not meeting this requirement.
 - (b) *Maximum taxes which may be levied.*—If State laws limit the taxes which may be levied for school purposes, give the limitation. If there are any limitations for specific functions such as elementary schools, high schools, current indebtedness, etc., give the nature of those limitations.
 - (c) *How taxes are levied:* Give the part played by the board of education in fixing or determining the rate (including lowering or raising tax rates), by any other county or State governing body and by the voters of the county. State specifically when and under what conditions each body may act.
 - (d) *Exceptions to general laws:* Give any exceptions to general State laws which apply to any counties or groups of counties. Certain counties, for example, may be permitted to levy higher taxes than authorized by general laws.
2. *County-wide property taxes and tax levies for other than school purposes.*—Give the amount of property taxes required to be levied (minimum rate) for other than school purposes, the purpose for which such levies are to be made and tax levies that may be made (maximum rate) for other than school purposes. Also explain how these tax rates are determined, including the part played by the county governing body and by vote of the people. If there is any limitation on total property taxes which may be levied on a county-wide basis, including school taxes, explain the limitation.
3. *Nonproperty taxes and funds for school purposes:*
 - (a) *List any other taxes which may be required to be levied for participation in the State minimum or equalization program.*
 - (b) *List other mandatory taxes or fees for schools.*—State what proportion of the total county school funds is derived from each.

- (c) *Method of administering each tax and fee listed above.*— Explain the function of the board of education; other governing bodies, and the people concerning the administration of each.
- (d) *Name any other funds or revenues in which the schools regularly participate.*— Explain regulations governing the distribution of these funds.
4. *Nonproperty taxes and funds for other, than, school purposes.*— Name and describe nonproperty taxes levied on a county-wide basis for other than school purposes. State the part played by the county governing board, vote of the people, etc., in levying these taxes.

SCHOOL SUPPORT PROVIDED ON A DISTRICT BASIS

This section should be devoted to discussions and explanations of revenues now provided or authorized on a strictly local basis, that is, by independent districts or by subdistrict within the county. Any taxes collected by them for the State or for the county should be excluded. Follow the same outline suggested under III except with attention to district instead of to county-wide taxes.

1. *District property taxes and tax levies for school purposes:*
 - (a) *Minimum rate for participation in the State equalization fund.*— If certain tax levies must be made or a certain amount per pupil must be raised before the schools in the district can participate in State funds, give the tax rate and list any districts that are not meeting this requirement.
 - (b) *Maximum taxes which may be levied.*— If the laws limit the taxes which may be levied for school purposes or for specific functions such as elementary schools, high schools, current indebtedness, etc., state the limitations.
 - (c) *How taxes are levied.*— State the function of the board of education in fixing or determining the rate (including the lowering or raising of tax rates), of any other district, county, or State governing body and of the voters of the district. State specifically when and under what conditions each body may act.
 - (d) *Exceptions to general laws.*— Give any exceptions to general State laws which apply to any districts or groups of districts. Certain districts, for example, may be permitted to levy higher taxes than authorized by general laws.
2. *District taxes for other than school purposes.*— Give the amount of property taxes required to be levied (minimum rate) for other than school purposes, the purposes for which such levies are to be made and tax levies that may be made (maximum rate) for other than school purposes. Also explain how these tax rates are determined, including the function of the district governing body and of the people. If there is any limitation on total taxes, including school taxes, which may be levied on a district basis, explain this limitation.
3. *Nonproperty taxes and funds for school purposes:*
 - (a) *List any other taxes which may be required to be levied for participation in the State minimum or equalization program.*
 - (b) *List other taxes or fees required to be levied for school support.*— State what proportion of the total district school funds is derived from each of these sources.
 - (c) *Method of administering each of these revenue laws.*— State function of the board of education, of other governing bodies and of the people.

(d) *Name any other funds or revenues in which the schools regularly participate.*

4. *Nonproperty taxes and funds for other than school purposes.*—Name and describe nonproperty taxes levied on a district basis for other than school purposes. State function of the district governing board, of the people, etc., in levying these taxes.

BUDGETARY PROCEDURES

Laws or regulations relating to budgetary procedure may have direct bearing on local school support.

1. *Preparation of the budget.*—Explain fully requirements in connection with the preparation of the budget. Also explain in detail budgetary procedures for issuing bonds for capital outlays.
2. *Approval of the budget.*—Explain in detail the exact steps which must be followed in getting the budget approved.
3. *Budgetary increases.*—Explain in detail how the budget may be increased.
4. *Budgetary decreases.*—If a decrease in expenditure is proposed sufficient to make a decrease in the tax rate, explain steps to effect the decrease.
5. *Changes or alterations in the budget.*—Explain what changes, if any, may be made by the board of education after the budget has been approved and what steps must be taken before other changes can be made.
6. *Exceptions for special classes of districts.*—Explain any exceptions or exemptions granted by law to any special classes or groups of districts or administrative units.

PROCEDURES FOLLOWED IN ISSUING SCHOOL BONDS*

Explain the steps to be taken by a board of education proposing to issue bonds for school purposes. Explain also any requirements on kinds of bonds to be issued, and requirements for sinking funds.

1. *Bond issues for new capital outlay.*—State steps required in their issuance.
2. *Bond issues for refunding purposes.*—State when outstanding bonds may be retired by a new issue of bonds extending over a longer period of time and/or at a lower rate of interest.
3. *Bond issues to cover deficits in operating expenses.*—State under what conditions and with what limitation these may be issued.

AUDITING AND ACCOUNTING

Explain procedures used in determining whether school funds are legitimately collected and spent. If there is a penalty for failing to use current funds to retire school bonds which are due, for creating obligations beyond those authorized in the budget, or for preparing or carrying out a budget which exceeds anticipated revenue, please explain fully.

1. *Accounting for school receipts.*—State who is charged with the responsibility for determining that the schools get all the money to which they are entitled and how often an audit of receipts is required; and whether the audit includes the records of local tax officials as well as of school officials.
2. *Accounting for school expenditures.*—Indicate what officials are charged with the responsibility for determining whether school funds are properly expended and how often an accounting is made.

* Includes what are termed "school warrants" in some States.

Proposing Improvements in Organization

Many proposals which are submitted for improving local school unit organization are likely to have great significance for the entire school program for many years. The fact that sound judgment at this stage of the study is of utmost importance should lead the staff to use every precaution to check each step in arriving at recommendations.

Proposals for improving the organization of local school units, based on careful consideration of all facts and factors involved, should be consistent with objectives and standards adopted, should be carefully analyzed to determine their possible effect on and significance to relationships, and should set forth clearly the steps required to attain the recommended program. Whenever warranted by conditions, the proposals for improvement should exceed minimum standards.

Determining school locations and boundaries of attendance areas, in most instances, should precede proposals for administrative or fiscal units; otherwise, boundaries proposed for the latter may divide some of the attendance areas, thus necessitating transfer of pupils and other special provisions.

If it can be demonstrated that the abandonment of a usable school building will result in economy and will increase the efficiency of the educational program, a new building on a new location should be provided.

Improvements that can be made without legislative change should be differentiated from those that must wait on legislative action.

School centers (locations) may be classified as permanent, possible, and temporary. A permanent center is one in which minimum standards can readily be met or exceeded. It is practically certain that there will be a sufficient number of pupils for this center to be continued indefinitely. A possible center is one in which it is difficult to determine whether a school should be continued permanently. It should be treated as a border-line situation which after a few years might develop into a permanent or a temporary center. A temporary center is one in which a school will have to be maintained for a few years until projected roads are developed, existing roads are improved, mineral resources are exhausted, or other changes occur. It will then be abandoned.

RELATIONSHIPS MUST BE CLEARLY DEFINED

Before any specific proposals for modification of local school units are made it will be necessary to determine not only the status and relationships

that are found at the present time but to foresee relationships that should exist when improvements are effected.* For example, if there are a number of small schools in the administrative unit at the present time, what would be the implications if these schools were discontinued and only one school recommended for the unit? Or, if at the present time there are a large number of small administrative units (districts in a county) which constitute a weak intermediate administrative unit, what would be the effect if these small districts were combined into three or four large administrative units? Would the existing county organization suffice? Again, if large administrative units are proposed, would it be desirable under any conditions to continue present fiscal units, as sub-districts, for taxing purposes?

If possible relationships are anticipated and planned along with the proposals for improving the organization, many difficulties may be avoided. Principles recommended in projecting relationships were prepared by a committee of representatives from the 10 States attending the conference on the Study of Local School Units, in Washington, D. C., in August 1936. The report setting forth these principles follows:

PROJECTED RELATIONSHIPS OF PROPOSED LOCAL SCHOOL ADMINISTRATIVE UNITS TO THE STATE AND ITS EXISTING EDUCATIONAL SUBDIVISIONS

I. RELATIONSHIP OF THE STATE TO THE LOCAL SCHOOL ADMINISTRATIVE UNITS.

A. General principles.

It is assumed that each State will have some type of local school administrative unit and that no State will attempt to direct and conduct through and by the State department of education all phases and details of its school program. In other words, it is assumed that the direct responsibility for administering the schools will be delegated to the respective local school administrative units.

It is further assumed that the responsibilities and relationships of the State will be based on these principles:

1. Education is a function of the State which cannot and should not be delegated in its entirety to local school administrative units within the State.
2. It is the responsibility of the State to define educational services which should be available to all of the children of the State and to set minimum standards¹ which should be attained in each local school administrative unit and for each attendance area. The more progressive organizations should be given opportunity and encouragement to advance beyond these minima.
3. The State through its system of financial support should guarantee to each local school administrative unit the funds, over and above those derived from required uniform local tax levies, necessary to provide the services needed by the children on the basis of minimum standards required by the State.
4. It is the responsibility of the State to specify the principles and standards which should be observed in the organization of local school administrative units and to see that those standards are not neutralized by special or local legislation.

¹ Characteristics of desirable situations.

5. The State should provide the leadership, stimulation, and legislation necessary to assure improvement in the educational program and should take the initiative in planning and encouraging the most efficient organization of attendance areas and local school administrative units.
6. The State should, with reasonable safeguards, delegate to local school administrative units, so organized, the administrative and supervisory responsibilities which can best be performed by such local school administrative units and which should be delegated to them in order to foster local initiative and autonomy.
7. The legislature should assign to the State superintendent or commissioner of education, functioning through the State department of education, the responsibility for the general supervision and administration of all matters which directly involve the State school system, and should avoid attempting to divide such responsibility among several State bureaus or agencies.

B. Major functional relationships.

The more detailed responsibilities of the State with reference to the program of education may be listed as follows:

1. *Board of education.*

In any State which has a State board of education elected or appointed to represent the people, it is assumed that this body will appoint the chief State school officer (usually called a State superintendent or commissioner of education), will consider and adopt policies necessary to assure progress by the schools of the State, and will see that these policies are executed through the State superintendent as the executive officer of the board.

In any State which does not have a State board of education, it is assumed that the State superintendent or commissioner of education will be responsible for determining, as well as for executing, policies related to the welfare of the schools.

2. *State superintendent or commissioner of education.*

The State superintendent or commissioner of education, acting through a State department of education, will have the responsibility for:

- (a) Providing leadership necessary to assure continued progress and stimulate interest in new and promising areas of education such as visual, radio, and adult education.
- (b) Interpreting provisions of the law which directly involve the school program.
- (c) Formulating minimum standards for the schools of the State in at least the following fields: Requirements for teachers and administrators pertaining to transportation, school buildings and sites, curriculum, attendance, records and reports, certification, etc.
- (d) Preparing regulations necessary to supplement the statutes in order to guarantee accurate, objective, and equitable apportionment of State school funds, and apportioning and distributing such funds to the local school administrative

- units of the State on the basis of objectively determined needs.
- (e) Devising rules and regulations necessary to supplement the statutes in order to insure efficient educational and business management of the schools, to require accurate and complete accounting for funds, and to provide in other necessary ways for the welfare of the schools.
 - (f) Planning special educational facilities for handicapped or exceptional children, particularly when such facilities cannot economically be provided by local school organizations.
 - (g) Receiving annual and periodic reports from local school administrative officials, auditing those reports, and summarizing the data in order to show present status and trends.
 - (h) Encouraging, sponsoring, or conducting a continuous program of research and investigation so that accurate knowledge may be available regarding the value of the various educational undertakings.
 - (i) Publishing articles, bulletins, and special reports so that information concerning school conditions and needs may constantly and continuously be made available to the citizens.
 - (j) Conducting such studies as are needed for stimulating plans for the proper organization of local school administrative units and attendance areas, and for planning school building programs in the various sections of the State.

II. ORGANIZATION, RESPONSIBILITIES, AND RELATIONSHIPS OF LOCAL SCHOOL ADMINISTRATIVE UNITS

The relationships between the local school administrative units and the State must be very carefully defined in order to avoid outcomes which may be unfortunate. For example, if the administrative unit which is to be proposed and encouraged is larger than present school districts in the State but smaller than the county, and if there is at present a county school organization, the development of the new local administrative unit (which may be a combination of several small units) may tend either to strengthen or to weaken the existing county organization, depending largely on the relationships which are projected or which develop through experience.

It is assumed that all States will wish to avoid perpetuating or establishing school administrative organizations which are largely impotent and useless. Where it is found impossible or impracticable to develop an organization whereby the State may deal directly with all local school administrative units, provision should be made for strong intermediate units which will assure those administrative and supervisory services which cannot economically be provided by local school administrative units, and which should not be provided directly by the State. Fiscal control of the schools should be vested in the officials responsible for administering the schools rather than in some non-school agency.

Numerous and varied types of local school administrative units are found in existence at the present time. However, on the basis of tele-

relationships with the State and with other local administrative units, the following four more or less distinct types of local school administrative units are recognized as offering satisfactory possibilities:

- (1) The county (parish) unit.
- (2) The county (parish) unit in which larger cities constitute independent units or districts.
- (3) The county (parish) as an intermediate supervisory and administrative unit.
- (4) The large district (or town) as the administrative unit.

THE EXACT TYPE OR TYPES OF UNITS AND OF RELATIONSHIPS WHICH SHOULD BE ENCOURAGED IN ANY STATE WILL DEPEND LARGELY ON TRADITIONS AND CONDITIONS IN THAT STATE

The four types of local school administrative units and the projected relationships of each such unit to the State and to other local school administrative units, are set forth below:

A. The county (parish) unit.

1. *Interpretation.*—In the strictly county or parish unit there will be no sub-units or sub-districts which have administrative responsibilities, nor will there be independent districts. Schools in cities within the county will be administered by the county board of education through the county superintendent of schools. All schools in the county will report directly to the county superintendent of schools.

The boundaries of the unit may be coterminous with the boundaries of the county but in practice should not be coterminous but should be expanded wherever necessary to include attendance areas which lie partly in another county and to exclude parts of attendance areas whose school centers are in another county.

2. *Responsibilities and relationships.*

- (a) *Board of education.*—It is assumed that there will be a board of education elected to represent the people. This board should appoint the superintendent of schools and pass upon policies recommended by him, but should not attempt to execute or administer policies.
- (b) *County (parish) superintendent.*—The county superintendent in such an organization should, subject to the regulations and minimum standards of the State, recommend the location of schools and the grades to be taught in each school; prepare the budget, nominate teachers, plan transportation routes, keep the records and reports, purchase supplies, and make reports to the State for all schools in the county and for the county school system. He should, also, assume any other responsibilities for the administration of the local school system which may be delegated by the State or which should be assumed by the local superintendent of schools.

B. The county (parish) unit in which larger cities constitute independent units or districts.

1. *Interpretation.*—This unit will be exactly like the county unit except for the fact that the larger cities will constitute independent units. Within the county there will be no sub-administrative

districts and all schools in the county, outside of the cities, will report directly to the county superintendent of schools.

2. *Responsibilities and relationships.*

(a) *County schools.*—The responsibilities and relationships of the county board of education and of the county superintendent will be exactly like those described under the county unit except that neither the county board nor the county superintendent will have any direct responsibility for administering the schools in the independent cities. The county superintendent will report directly to the State for all schools which come under his jurisdiction; he will also report directly to the State for any matters which involve both the county schools and the schools in independent cities (such as joint teachers' meetings or institutes, school census, etc.). If county-wide taxes are collected on all property, including property in the independent cities, the county board of education will probably also be charged with the responsibility for apportioning a proportionate part of these funds to the boards of education of the respective independent city districts. Such apportionment preferably should be in accordance with an equalization formula defined by law.

(b) *Independent cities.*

(1) *Board of education.*—It is assumed that each independent city will have a board of education elected at large to represent the people. This board of education should appoint the superintendent of schools and pass upon policies recommended by him but should not attempt to execute or administer policies.

(2) *The superintendent of schools.*—The superintendent of schools for each independent city, subject to the regulations and minimum standards of the State, should recommend the location of schools and grades to be taught in each school, prepare the budget, nominate teachers, plan transportation routes if necessary, keep the necessary records and reports, and make reports directly to the State for all schools in the city and for the city school system. In fact, his responsibility for the schools in the independent city school system should parallel the responsibilities of the county superintendent for the schools in the county school system. There should, however, be a very close working relationship between the two superintendents so that the interests of the children may best be safeguarded.

C. *The county (parish) as an intermediate supervisory and administrative unit.*

1. *Interpretation.*—In this situation there may or may not be independent city districts within the county. If there are independent city districts, the relationships of those districts to the county and State will be the same as the relationships of city districts explained under B above. Whether or not there are independent city districts, the county will be divided into two or more districts which will be administratively dependent and which will constitute sub-administrative units. The sub-admin-

istrative units will have few direct relationships with the State and many very close and direct relationships with the county. The number and kind of services which should be rendered by the county will vary with the size of local administrative units.

2. *Responsibilities and relationships.*

(a) *The county school organization.*

- (1) *The board of education.*—In any State which has a county board of education it is assumed that this board will be elected at large to represent the people. It should have the responsibility of appointing the superintendent of schools and of passing on policies recommended by him but should not attempt to execute or administer policies.

It will have the additional responsibility of approving or disapproving certain policies recommended by the boards of the subadministrative units as indicated below. Presumably the county board of education will provide for all subadministrative units within the county such services as health, attendance, business management, etc., which can be most efficiently and economically provided on a county-wide basis.

In any State which does not have a county board of education it is assumed that the county superintendent will be responsible for determining, as well as for executing, policies relating to the welfare of the schools.

- (2) *County superintendent of schools.*—The county superintendent should, subject to the regulations and minimum standards of the State, recommend the personnel and policies for such services as health, attendance, business management, etc., to be provided by the county; should recommend apportionment of or should apportion State and county funds to the subadministrative units in accordance with the principles of equalization; should evaluate recommendations of the subadministrative units concerning the location of schools and grades to be taught therein, the proposed organization of some subadministrative units, the proposed budget for each unit, the appointment of teachers, the arrangement of transportation routes, etc.; and in States where there is a county board of education, should make recommendations to the board on the appropriate action needed. He should make reports to the State for the subadministrative units and for the county school system.

(b) *Organization for subadministrative units.*—(May be community units.)

- (1) *Directors or trustees.*—It is assumed that each subadministrative unit will have a board of directors or trustees elected by the people. This board should nominate for appointment, subject to the approval of the county superintendent or board of education, the superintendent or supervising principal for the units who may act as an assistant county superintendent. It should

approve policies recommended by him to be submitted to the county superintendent or board of education.

- (2) *Superintendent for the subadministrative unit.*—The superintendent or supervisory official for the subadministrative unit should recommend the location of schools and grades to be taught in each school in his system, prepare a tentative budget, nominate teachers, requisition supplies needed, plan tentative transportation routes, keep the necessary records and reports, and make reports to the county superintendent for all schools in his unit, and for the subadministrative unit.
- D. *The large district (or town²) as the administrative unit.*
1. *Interpretation.*—The large district (or town) in this type of organization will be the administrative unit directly responsible to the State. This district (or town) may be smaller or larger than a county. Since there will be no intermediate county organization, it is obvious that no administrative and supervisory services will be provided by the county. Necessarily, therefore, each district (or town) must be sufficiently large that it can economically and efficiently provide all the services needed by the schools in the district, except those which are provided directly by the State.
 2. *Responsibilities and relationships.*—The board of education and the superintendent of schools will have the same relationship to the schools of the district (or town) and to the State as the county board of education and the county superintendent have to the schools of the county and to the State in a county unit organization. (See II-A.)

PLANNING THE REORGANIZATION OF SCHOOLS, ATTENDANCE AREAS, AND ADMINISTRATIVE UNITS

Determining location of schools and boundaries of attendance areas.—The first procedure in reorganization of schools in any selected area is to set up a tentative plan for the centralization and for the location of needed schools. With the aid of maps, revealing the existing organization, the distribution of school population, transportation facilities, status of school sites and buildings, topography, and land use; with pupil personnel and other data revealing status and trends; and with a statement of standards adopted, the most desirable senior high school center or centers can be readily selected. Schools in the area of these proposed high-school centers should be studied to determine which should be retained, which combined with others, and which abandoned. The determination of these facts is necessary for the solution of problems relating to transportation, building facilities, administrative, supervisory, and teaching personnel, and finance. The suggested procedure for setting up such a tentative plan is as follows:

The director of the study should form a council composed of the county superintendent of schools; the district superintendents, if any;

² Town, as here used, should be interpreted to include the territory within the corporate limits of a city, or to include also smaller villages and rural territory.

the principals of schools; and one or more lay leaders, perhaps school board members, from each of the communities affected. The function of this group is to determine, after due consideration of all relevant questions, locations for schools. Generally, there is not much difficulty in such a council's agreeing upon the locations of the large central high schools. The problem of eliminating, either partly or wholly, high-school instruction in existing small schools usually involves considerable discussion.

The director of the study should explain carefully the standards as to the size of schools and as to the type of organization. Every school in the area of the central high school, as well as of the central junior and/or elementary school, should be considered carefully, especially with reference to the necessity and the feasibility of transporting children and to the effect upon the community life of the immediate area where the school is located. A convenient scheme for arranging existing and proposed schools is suggested:

Indicate by Roman numerals the proposed high schools, where instruction will be provided for at least grades 10, 11, and 12, or for some combination of grades 7 to 12, inclusive; by Arabic numerals the elementary schools to be retained or to be established; and by capital letters the proposed junior high schools.³ Under the name of each school proposed—senior, junior, and elementary, respectively—list the names and/or numbers of existing schools to be abandoned.

In some areas there will be schools from which children cannot be transported; this condition may be either temporary or permanent. These existing schools should be listed in connection with the proposed school or schools which the pupils will most likely attend.

A tentative list of schools proposed may thus be prepared to give the following information regarding each proposed permanent, possible, or temporary school location or center:

1. The number of pupils at each of the existing schools and the estimated number at the proposed school.
2. The number of teachers at each of the existing schools and the estimated number at the proposed school.
3. The number of transportation routes serving each of the existing schools and additional routes needed.

After the tentative plan for school reorganization is set up, doubtful situations should receive further consideration and probably personal inspection by members of the survey staff as a result of which, in connection with revealing data, a final plan should be made.

In the State report of the study of local school units in Tennessee, the following table is presented to reveal changes proposed in the organization of schools in existing centers:

³ Applicable only when this type of organization is followed.

LOCAL SCHOOL UNITS

FIGURE 4.—Proposed Reorganization of Attendance Areas in Cheatham County*

School	Organization, 1935-36			Ultimate program (Organization)				
	Type of school	Number of pupils	Number of teachers	Transferred		Type of school	Enrollment	Number of teachers
				Grade	Number of pupils			
1	2	3	4	5	6	7	8	9
I. ASHLAND CITY	1-12	492	15			1-12	650	18
TO BE ABOLISHED								
1. Sam's Creek	1-8	22	1	1-8	22			
2. Lillamay	1-8	29	1	1-8	29			
3. Cochran	1-8	21	1	1-8	21			
4. Bethlehem	1-8	24	1	1-8	24			
HIGH-SCHOOL CENTER FOR								
1. Pleasant View				10-12				
2. Cheap Hill				10-12				
3. Green Brier				7-12				
4. Idlewild				7-12				
5. Bear Wallow				7-12				
6. Mt. Zion				7-12				
7. Marrowbone				7-12				
8. Thomasville				10-12				
9. Pinnacle				10-12				
10. Cheap Hill				10-12				
11. Neptune				10-12				
12. Poplar Ridge				10-12				
A. Mt. Zion	1-8	109	3	7-8	15	1-6	94	
B. Bear Wallow	1-8	68	2	7-8	11	1-6	57	
C. Green Brier	1-8	52	2	7-8	12	1-6	40	
D. Idlewild	1-8	46	2	7-8	5	1-6	41	
E. Marrowbone	1-5	62	2	7-8		1-6	70	
II. PLEASANT VIEW	1-8	113	4			1-9	250	
TO BE ABOLISHED								
1. Woodlawn	1-8	40	2	1-8	40			
2. Sweet Home	1-8	19	1	1-8	19			
3. Triangle	1-8	29	1	1-8	29			
4. Brewers Chapel	1-8	28	1	1-8	28			
High school center for								
1. Thomasville				7-9				
2. Pinnacle				7-9				
A. Thomasville	1-8	57	2	7-8	12	1-6	45	
B. Pinnacle	1-8	928	3	7-8	10	1-6	118	
III. CHEAP HILL	1-8	53	2			1-9	200	
TO BE ABOLISHED								
1. Beech Grove	1-8	38	1	1-8	38			
2. Lockertsville	1-8	29	1	1-8	29			
3. Neptune	1-8	46	2	1-8	46			
A. Bethel	1-8	52	2	7-8	12	1-6	117	
TO BE ABOLISHED								
1. Herman	1-8	16	1	1-6	13			
2. Hinton	1-8	46	1	1-6	41			
3. Pinson	1-8	26	1	1-6	23			
B. Poplar Ridge	1-8	70	2	7-8	10	1-6	60	
IV. KINGSTON SPRINGS	1-10	111	5	10	11	1-9	205	
TO BE ABOLISHED								
1. Barr's Chapel	1-8	23	1	1-8	23			
2. Craggie Hope	1-8	33	1	1-8	33			
3. Cedar Hill	1-8	17	1	1-8	17			
4. South Harpeth	1-8	46	2	7-8	13	1-6	91	
A. Pegram	1-8							

Footnotes at end of table.

FIGURE 4.—Proposed Reorganization of Attendance Areas in Cheatham County—Continued

School	Organization, 1935-36			Ultimate program ¹ (Organization)				
	Type of school	Number of pupils	Number of teachers	Transferred		Type of school	Enrollment	Number of teachers
				Grade	Number of pupils			
1	2	3	4	5	6	7	8	9
IV. KINGSTON SPRINGS—Continued								
TO BE ABOLISHED—Continued								
1. Dog Creek	1-8	36	1	1-6	32			
2. Cedar Hill	1-8	31	1	1-6	26			
V. ARRANGEMENT WITH ADJACENT COUNTIES								
1. Kingston Springs ²	1-10	111	5	10	11	with Dickson County.		
2. St. Amanda's Chapel	1-8	36	1	1-8	36	with Dickson County.		
3. Mt. Pleasant	1-8	25	1	1-8	25	with Davidson County.		
4. New Hope	1-8	51	1	1-8	51	with Montgomery County.		
Total			77					60

¹ Grades 7 and 8 to Kingston Springs.
² Grades 11 and 12 are now transported to Dickson County.
³ Tennessee State department of education. A study of local school units in Tennessee. Nashville, the department, 1937. pp. 167-68.

Explanation of table: Capitals indicate the four major school centers of the county and immediately below is shown the relationship of the major center to the other schools in the surrounding territory.

PROPOSING IMPROVEMENTS IN ADMINISTRATIVE UNITS

After the location of schools has been determined, the approximate boundaries for attendance areas decided upon, and the relationships among the revised units established, the staff will be able to propose the needed improvements in administrative units. Particularly helpful now will be the maps showing existing conditions in present school districts and proposed schools and school centers, the statement of projected relationships, and the standards proposed for administrative units.

After the extent of the administrative units has been tentatively determined so that all standards will be satisfactorily met, the tentative boundaries should be sketched on a field or work map so that insofar as possible they will follow natural divisions. In general, boundaries of administrative units should coincide with boundaries of the high-school attendance area or areas to be included.

When the final plan of reorganization has been agreed upon, a map of the county, or other area studied, should be prepared to show the boundaries of the proposed attendance areas and administrative units, the location and size of each proposed school building, the roads to be used as bus routes, and the distribution of school population. In States where separate schools are maintained for whites and Negroes it may be necessary to prepare two maps: One showing the data for white schools and the other data for Negro schools.

A separate map devoted to administrative units will probably be desirable in situations where there are at present many small districts. Boundaries of these small districts can be shown by light lines and boundaries of the proposed administrative units by heavy lines.

DETERMINING THE COST OF THE PROPOSED PROGRAM

After the steps outlined above have been taken it is possible to determine the cost of the recommended program. Thus the cost of the minimum recommended program for the entire State may be determined as soon as the cost in each of the proposed administrative units is known. Good business procedure, of course, demands that the cost of the proposed program be determined as accurately as possible for several years.

Salaries of teachers for each of the proposed schools or centers can be determined with reasonable accuracy. Need for other current expenses except transportation, will be rather directly proportional to the needs for salaries of teachers, particularly when expressed in terms of unit costs. Transportation costs can be calculated in terms of the number of pupils to be transported and the density of transported population. The total will then represent the cost of the current expense program for the administrative unit and, when projected for several years, will provide the basis for planning the financial program.

The school building program can also be readily projected and the approximate annual cost determined. In determining and projecting the cost of the school building program a table prepared as below for each of the school centers recommended may be helpful:

Present number of suitable classrooms and estimated number of rooms needed at each proposed center

Proposed permanent center	Present number of suitable classrooms	Estimated number of rooms needed				Number of rooms to be constructed	
		Elementary	Junior high	Senior high	Total		
	1	2	3	4	5	6	7
1. Borden Springs	4	3			3		0
2. Southwest of Mars Hill	0	6			6		6
3. Fruithurst	14	7			10		6
4. Hefflin:							
(a) Elementary	0	7			7		7
(b) High school	6		4	4	8		2

¹ Plus auditorium.

The needs as thus reflected can be translated into constructional costs on the basis of data assembled to show the approximate cost of construction per unit, such as the classroom. Construction costs in the State should be studied for a period of years to determine trends in costs per classroom unit, or for such other units as may be used, and for the various types of construction. For the purpose of this study buildings may be classified

according to the type of construction as listed by the American Institute of Architects.

A table can then be prepared to show for each proposed school or center within a given administrative unit the number of rooms needed, the type of construction recommended, and the estimated cost of construction:

Estimated cost of needed construction

Center	Number of rooms needed	Type of construction recommended	Estimated minimum cost
1 Borden Springs	0		
2 Southwest of Mars Hill	16	Frame	\$14,000
3 Fruitburst	6	Semipermanent	15,000
4 Heflin	9	Permanent	27,000

1 Plus auditorium.

The approximate time at which construction should be undertaken should be determined so that the program can be projected in costs per year. After all costs are known, officials will be in position to decide whether the projects should be financed by bond issues, with the amortization so arranged that costs will be fairly evenly distributed over the period, or whether a pay-as-you-go plan should be recommended. Under either plan the approximate amounts needed for capital outlay and debt service for each of the next several years can be determined. Whether this program can be financed by the tax levies authorized (that is, if special or limited capital outlay and debt service levies are unauthorized) will be a factor in determining whether legislative changes need be made to assist the units proposed in providing funds for capital outlay and debt service.

When costs of the program recommended have been determined it will be possible to calculate the yield from uniform tax levies recommended or considered as available to meet these costs of the minimum program in the several administrative units, and to determine how much must be made available to each unit from the State.

Securing the Cooperation and Support of the Public

GENERAL SUPPORT ESSENTIAL

The real test of the value of studies of local school units is the extent to which they result in bringing about needed improvements. Regardless of studies that may be made, local school units will exist in their present form as long as the public believes that the existing organization is satisfactory. Modifications in these units will be made only when the people are convinced that the changes proposed will result in benefiting the public by improving the schools.

Plans for securing active support and cooperation should be developed concurrently with plans for carrying on the study of local school units. Such plans should afford a practicable basis for securing the necessary cooperation at the beginning of the study and for securing further any special support needed as each step of the study and of the consequent proposed program is projected. From the initiation of the study outstanding leaders in the State should have opportunity to share in the responsibility of carrying on the program. Local and State leaders in educational work should have a part in formulating objectives, standards, and procedures. Lay leaders must be convinced that objectives, standards, and procedures are sound, must be familiar with steps taken to arrive at conclusions, and must feel assured that the study program has been carried on scientifically. In general, professional leaders should participate in the development and approval of all phases of the program and lay leaders should be sufficiently involved in decisions regarding each major phase of the program to be willing to assume their share of the responsibility for proposals based on the findings of the study. Although the public cannot be expected to follow all technical details of the program, it should be made to realize that the changes proposed will result in better schools at a reasonable cost; in short, it must appreciate the necessity for and consequently favor the general idea of improving local school unit organization.

The following joint-committee report, prepared at the conference of representatives from the 10 States in Washington, D. C., in August 1936, proposes principles and procedures for securing public support:

PRINCIPLES AND PROCEDURES NECESSARY TO ASSURE PRACTICAL OUTCOMES FROM STUDIES OF LOCAL SCHOOL UNITS

SECURING PUBLIC SUPPORT:

A. Introduction.

We assume that steps which are taken toward organization of satisfactory attendance areas or local school administrative units in any State must be based on thoroughly democratic procedures. In this country it is undesirable, if not impossible, for any small group, professional or nonprofessional, to formulate a program within the group and then proceed to have the program implemented by compulsory legislation enacted as a result of high powered pressure on the legislature. While the public cannot be expected to master all of the technical details of a program, it must be assumed that at least the leading citizens must be acquainted and in complete accord with the fundamental principles on which the program is to be based. It is further assumed in this report that those who aid in organizing and formulating the program will be more enthusiastic in supporting it than if they had had no part in it.

B. Principles relating to public support.

The following principles are submitted for guidance in formulating and organizing a program which may or may not need to be implemented by legislation.

1. The State project staff and the State superintendent or commissioner of education should take the initiative in planning the study, in collecting and interpreting data, and in developing a program for the organization of satisfactory schools, attendance areas, and local school administrative units which will meet the needs of the children of the State.
2. The cooperation of all educational agencies in the State should be secured and preserved throughout the life of the project in order to further most efficiently the objectives of the study.
3. Assistance should be sought and secured whenever needed to develop special phases or features of the program. For example, the cooperation of land use specialists should be secured to make available land use maps and related information which needs to be considered in formulating specific recommendations for particular areas in the State.
4. The cooperation of leading citizens and civic organizations of the State is essential in developing the nontechnical phases of the program. Their support of the principles underlying the technical phases of the program is likewise desirable.
5. The cooperation of the professional and lay leaders and groups can best be secured by giving them opportunity to take part in defining services, formulating standards, recommending procedures, etc.
6. The better the plan and procedure for securing direct or indirect participation of various individuals and agencies and the more nearly all influential individuals and agencies participate, the better the prospect that the program will be generally accepted and supported.

C. Securing the cooperation and participation of school officials and teachers.

1. State department of education.

- (a) The success of the study depends upon the extent to which the objectives of the project are made a part of the objectives of the

- State program of education and of the State department of education. The State superintendent or commissioner of education must assume the responsibility for seeing that this is accomplished. Each member of the department must be familiar with all the major phases of the program and lend his assistance whenever such assistance may contribute to the successful development of the project.
- (b) Individual members of the department can be of invaluable service in aiding (1) in the formulation of standards, (2) in proposing special studies in their respective fields, (3) in advising about the development of tables and charts, and (4) in aiding in contacting and explaining the project to the public school people in the State.
2. State colleges and universities.
- (a) Faculty members, particularly those in the fields of education and political science, should be thoroughly familiar with the project objectives and procedures.
- (b) Faculty members and graduate students can be of material assistance to the project staff in determining services, formulating standards, planning tables, charts, and maps, and in interpreting data. Special related studies can often be suggested and perhaps carried on by faculty members and graduate students.
3. County and city superintendents, principals, teachers, and pupils.
- (a) County superintendents in most States will be among the most important factors in promoting and successfully carrying out the program. They should be familiarized with all phases of the project and their active cooperation secured. The complete cooperation of city superintendents is just as essential as that of county superintendents.
- (b) A local advisory council, composed of the county superintendent, city superintendents, principals, and teachers in the county, should probably be formed and consulted regarding problems and procedures in the area.
- (c) All principals and teachers should be familiar with the project and be given every opportunity to see the problem from at least a county-wide point of view. They should be encouraged to take up as classroom problems many of the phases of the project which are adapted to such procedure.
- (d) Pupils should be given opportunity and encouragement to carry on special studies in their own schools under the direction of principals and teachers. They can prepare soil maps, road maps, transportation route maps, spot maps, and can assemble and interpret many interesting facts about the school and community. These facts might profitably be developed into a school-community handbook from which a county or regional handbook could readily be prepared.
4. State education association.
The cooperation of the leading officials and of various committees should be secured in planning and carrying on the work of the project.
5. Advisory councils.
A professional advisory council including college teachers, superintendents, principals, and classroom teachers can be organized to advise and approve various aspects of the project. One professional

advisory committee might give valuable assistance on maps, another on tables and charts, etc.

D. *Steps designed to secure the cooperation of citizens, including school patrons.*

1. A State advisory committee, consisting of outstanding citizens, should be organized at the beginning of the project. This advisory committee should be consulted and should feel that it has had a part in developing all phases of the program which can readily be understood by laymen. It should endorse the more technical phases of the program.
2. There should also be local advisory committees. Nominations should probably be made by the county superintendent and from the list of nominees, the State superintendents should select for appointment from three to five people who should be thoroughly acquainted with the program and should be kept in touch with the development of the program as it will affect the school situation in that county.
3. Conferences should be arranged with individual citizens and discussion groups.
4. Special articles, including sample charts and tables, should be prepared for newspapers.
5. The parent-teacher associations in particular should be kept in close touch with the program.
6. Leaders of various civic forums and other groups in the State should be personally contacted and acquainted with the program.

E. *Data and materials to be presented to individuals and groups.*

It is assumed that general advisory committees and councils will be kept in touch with all phases of the program. Special advisory committees will be kept in touch with data in their respective fields. For other individuals and groups, types of data which will be applicable to the group or situation will be selected and properly arranged for presentation.

The report of the committee on State Reports on Organization of Attendance Areas and Local School Administrative Units and the outline for this report give specific suggestions regarding data and materials to be presented to individuals and groups. At least the following should be fully presented and explained.

1. Significant trends during the history of the State relating to the development of attendance areas and local school administrative units.
2. Proposed standards in terms of services, size, and costs.
3. Data on present status of schools, attendance areas, and local school administrative units to include particularly: Evaluations of and comparisons between large and small schools, and evaluations of and comparisons between various types and sizes of districts or administrative units.
4. Data on proposed program.

REPORTING TO THE PUBLIC

To secure and retain the confidence of educational leaders, lay leaders, and the public, State authorities should be assured that all information is presented fairly and justly. Since public schools owe their origin and

support to the public, the people are entitled to an accurate accounting, including statements of findings of the study program, and to consequent recommendations designed to improve the educational program. Information should be presented in terms which can readily be comprehended. Pertinent data including maps, pictures, charts, and oral, as well as written, reports should be prepared for lay groups as well as for professional groups.

Although, in general, a report should center major attention on the outstanding issues and problems with emphasis on objective data, it must contain some detailed information. Care must therefore be exercised that such a report is not too long and too detailed. Many materials excluded from a report, should be filed for reference.

Local reports.—A suggested outline for a report on local school attendance areas and administrative and fiscal units is included in chapter VII and additional suggestions are found in chapter VIII. Whether or not this outline can be followed without modification will depend upon particular situations. Helpful suggestions for writing such reports are found in the report of the committee on State reports.

Special reports.—From time to time it may be desirable to prepare special reports dealing with certain phases of the study. A combination of narrative, graphical, and pictorial materials have been and can be used successfully in these reports. These materials are also usable in conferences with individuals and with discussion groups. Oral reports can be effectively used to present findings and to explain and interpret recommendations and to provide the incentive for reading and further study. They have the advantage to clear up matters that are not understood by giving the listener opportunities to ask questions. In most instances there should probably be two types of oral reports, a formal report to boards of education and advisory committees and an informal report to the public. On the assumption that the members of the board have been kept in close touch with the progress of the study, the final report (oral) should preferably be formally presented at an official meeting called for that purpose. The minutes of the board should cover the presentation and show any action taken.

Newspapers and other local publications should always be kept in mind for presenting problems and situations on which the public needs to be progressively informed.

State reports.—There are many challenging possibilities in the preparation of a State report that present a clear-cut picture of the situation, needs, and recommendations. Principles governing the preparation of this report, prepared by a committee of representatives from 10 States attending the conference on the Study of Local School Units in Washington, D. C., in August 1936, are presented:

STATE REPORTS ON ORGANIZATION OF ATTENDANCE AREAS AND LOCAL SCHOOL ADMINISTRATIVE UNITS

I. *Introduction.*

The major purposes of the study of local school units should determine the nature of reports to be prepared, published, and circulated in any State. It will readily be accepted that the major purposes of the study include not only an evaluation of existing school conditions as affected by and related to existing attendance areas and local school administrative units, but also the development of a program for organizing satisfactory schools, attendance areas, and local school administrative units to the end that adequate educational opportunities may be provided for every child from the time he should enter school until he is ready to take his place in adult society.

This committee desires to emphasize the following additional objectives of the study which are significant for determining the nature of reports to be prepared and published: (1) To acquaint professional and lay leaders and the general public with conditions and needs with reference to the present school organization in the State; (2) To acquaint professional and lay leaders and the general public with principles and procedures which should be followed in the organization of satisfactory schools, attendance areas, and local school administrative units; (3) To secure the support of these groups in taking such steps as may be necessary to organize satisfactory schools, attendance areas, and local school administrative units.

Materials which will contribute directly to the realization of these objectives of the project should be included in State reports relating to the project; other materials not related to these objectives should be excluded.

II. *Specific Recommendations Relating to State Project Reports.*

The committee wishes to submit the following recommendations:

- A. In each State in which a study of local school units is carried on, there should be a very carefully prepared report which will contribute directly to the realization of the major objectives of the project.
- B. The report should follow in all States the same outline of major points so that data and procedures will be comparable.

It is recognized, of course, that conditions differ somewhat from State to State and that slight variations from the outline will probably be necessary. Some States, for example, may find it desirable to place increased emphasis on transportation or on some other phase of the program. Such variations will generally be in the nature of supplementary materials and in points of emphasis.

- C. The report should be printed and made available for distribution not only within the State but in all other States.
- D. In some States it will be desirable to prepare two reports. In such cases the first report will be in the nature of a professional report, comprising a detailed and logical presentation of the significant facts and conclusions derived from the study.

This first report should be presented in sufficient detail that professional students of education can follow the procedures, check the data, and arrive at the same logical conclusions. It

should be placed particularly in the hands of professional groups, colleges, libraries, etc.

The second report, when deemed necessary by State officials, will probably be in the nature of a simple digest of the outstanding features of the professional report.

When a second report is prepared, it will comprise a brief presentation of the major problems and findings, a clear-cut justification for the recommendations, and a brief statement of the proposed program. It should be written in simple, non-technical language and should contain excellent charts and maps so that it will be of outstanding interest to the layman.

If only one report is prepared for publication, great care should be exercised in its preparation so that it will be readily intelligible to lay readers of the State as well as professional educators.

III. Purpose of the report.

The report (or reports) should serve the general purpose of presenting the program and explaining the need and justification for the program. More specifically, it should serve the following purposes:

- A. It should serve as one very effective means for acquainting those professionally and officially engaged in education and also the general public with problems in the State relating to the organization of attendance areas and of local school administrative units, and with the need for solving those problems.
- B. It should present a program and suggest the steps that should be taken in carrying out that program so that lay and professional leaders of the State can be guided by the report during coming years.
- C. It should present materials and data which can be used by professional educational leaders of the State as a basis for further studies, and as a basis for formulating other phases of the program or making, from time to time, needed revisions in the program.
- D. It should present data and procedures, relating to the organization of attendance areas and local school administrative units in the State, which will be of value to professional and lay leaders of any other State who are planning a similar program.

IV. Procedures for writing the report.

The committee believes that this report can and should be written in sections in accordance with an outline prepared in advance. For example, the historical part of the report or the part which will interpret trends, as explained in the topic below, can and should be prepared in the immediate future. The part relating to standards can also be prepared immediately, assuming, of course, that these standards have already been prepared and approved by the various advisory committees. On the other hand, the parts of the report relating to the evaluation of present status and those parts dealing with the proposed program cannot be fully prepared until toward the close of the project.

The committee earnestly recommends that the project staff in each State so prepare its schedule and plans that a complete report can be prepared for publication before the close of the project. To have the project close with such a report unprepared or only partially prepared, would be most unfortunate. Assuming that the assembling of basic data will soon be completed in all States, the summary tables and charts for each State can be prepared before all county reports are written.

The committee wishes further to emphasize the importance of clarity and conciseness in the presentation of materials. Tables, charts, maps, and other graphic devices should be used whenever advisable to strengthen materials presented. Accepted rules for preparing good illustrative materials should at all times be observed. The writing should follow a smooth, descriptive, and narrative form and must avoid assuming that the reader will study in detail complicated tables to get the facts on which he must form conclusions.

I. *Suggested content of the report.*

The committee does not propose to present here a detailed outline which can be followed by each State. Instead, it suggests some of the major points which should be included in such an outline and recommends that the detailed outline be prepared by the Office of Education staff in the form of a revision of the tentative outline for this report submitted at the conference. It is particularly important that procedures used in arriving at the proposed program be fully explained and justified. The following are some of the major points which should be included in the report for each State.

- A. *Introduction.*—The introduction should contain brief statements concerning the nature of the project, how the work was carried on, the agencies which participated, and the purpose of the program presented.
- B. *Major trends and their significance.*—The project staff of the State should single out at least the major trends relating to the organization of attendance areas and local school administrative units in the State. These trends should be carefully traced to the present time and their significance for the educational program of the State should be explained. *These explanations should constitute the background and foundation for standards which are proposed as a basis for organization of satisfactory attendance areas and local school administrative units.*
- C. *Proposed standards.*—The standards to be used as a basis for evaluating the present program and for formulating the proposed program should be clearly and concisely set forth and justified.
- D. *Evaluation of present status in terms of standards.*—This evaluation should be presented in terms of services provided to the children. Defects and weaknesses of the existing educational situation should be clearly set forth. Variations in present services, standards, and costs can be used to show the need for improved organization.
- E. *Proposed organization of attendance areas and local school administrative units.*—In this section the proposed program as it applies to some county or area in each distinct section of the State should be presented and interpreted. The procedures used in arriving at the proposed program should be carefully explained. A summary should be prepared for the State, showing advantages of the proposed over the present organization.
- F. *Financial needs.*—For each county or area in the State and for the State as a whole, the minimum financial needs should be carefully determined. Comparisons should be made between (1) present costs of existing units, (2) costs on the basis of the proposed organization without any added services, and (3) costs in terms of the proposed minimum program.

G. *Legislative program.*—The handicaps afforded by present legislation should be brought out and the principles which should be incorporated in legislation which is to be proposed should be explained.

The following suggested outline prepared to carry out the recommendations of the committee is submitted as a basis for preparing that phase of the report relating to and revealing trends. Outlines for other phases should be similarly prepared.

SIGNIFICANT TRENDS AS RELATED TO ATTENDANCE AREAS AND TO LOCAL SCHOOL ADMINISTRATIVE UNITS IN THE STATE

This section of the report should include statements and data setting forth as definitely as possible the status of attendance areas and of local school administrative units during the early history of the State and should proceed to trace significant trends to the present time. Particular attention should be devoted to any major changes in laws or traditions which have been brought about by or which have resulted in changes in policy or status. At least the following items should be included:

A. *Attendance Areas.*

1. *Characteristics of early schools.*—Include such significant items as the tendency to locate schools within walking distance of pupils. Give a brief characterization of grade classification used, curriculum, training of teachers, etc.
2. *Classification.*—Trace beginning and development of tendency to establish nursery schools, kindergartens, junior and senior high schools, junior colleges, etc. Bring out any tendency to limit the work of smaller schools to elementary grades and to establish high schools in larger centers.
3. *Transportation and effect on schools.*—Show when and how transportation originated and trace effect of increasing transportation on size of schools and type of work offered in schools.
4. *Curricular developments.*—Bring out the effect on attendance areas of the tendency to offer a broader range of materials on various levels.
5. *Minimum standards.*—Trace steps in formulating and applying minimum standards for the establishment or recognition of schools, and trace responsibility for checking observance of those standards. For example, if, at any time, minimum standards have been established by law or by regulation of the State board or State department of education requiring a minimum enrollment for a school to be maintained or requiring certain services, enrollment, etc., before an elementary or high school could be standardized or accredited, such developments and related trends should be clearly brought out.
6. *Tables and charts.*—Tables and charts should be prepared so that trends for elementary and high schools separately, as well as for elementary and high schools combined, can be presented. It may also be found desirable to present trends for rural areas as distinct from urban areas (cities of 2,500 or more). Data by 10-year intervals will be helpful, provided facts can be obtained for three or four decades. If that is impossible, data may be presented by 5-year intervals. The following tables and charts, which are set forth in blank form in the appendix, are considered essential. Such tables and charts should be prepared exactly as

indicated so that comparisons may be made among States. Supplementary tables and charts will undoubtedly be found desirable in most States.

- (a) General population, school population, enrollment, and average daily attendance by 10-year intervals.
- (b) Percentage increases in school population (census), enrollment, and average daily attendance since 1900.
- (c) Elementary (and high) school enrollment by 10-year intervals.
- (d) Number of elementary (and high) schools by size (number of teachers) by 10-year intervals.
- (e) Number and percent of elementary (and high) school pupils enrolled in schools according to size (number of teachers) by 10-year intervals.
- (f) Number and percent of elementary (and high) school pupils enrolled according to length of term.
- (g) Training of elementary (and high) school teachers by 10-year intervals.
- (h) Number and percent of pupils transported at public expense by 10-year intervals.

7. *Significance of trends for organization of future school centers.* Important trends should be interpreted in terms of their probable bearing on future school size or organization.

B. Local school administrative units.

1. *Characteristics of early administrative units.*—Show any tendency to develop an administrative unit about each school or attendance area and relate to the organization of schools.
2. *Trends in size of administrative units.*—Call attention to laws or measures that have encouraged development of larger units and explain such trends.
3. *Conception of services to be rendered through administrative units.*—Show how the conception of administrative and supervisory services to be rendered has expanded from time to time and trace the effect of this on the size of administrative units.
4. *Tendency to develop different types of units.*—If more than one type of administrative unit has existed at any time, show why and how different types were developed. Trace major trends and explain significance of each. Stress particularly any tendency to make units *independent or partly independent* of county supervision and control, or the opposite tendency to make them more dependent on county supervision and control.
5. *Financial measures.*—If provisions relating to State or local support have encouraged or have discouraged changes in administrative units, trace such provisions and explain their significance.
6. *Economy.*—Trace relationship between trends in organization of administrative units and tendency toward emphasis on economy or on other features of school organization.
7. *Responsibilities.*—Trace trends indicated by 2, 3, 4, and 6, above by noting changes in the following:
 - (a) Responsibility for selection of the superintendent.
 - (b) General duties of the superintendent.
 - (c) Responsibility for preparing and approving the budget.
 - (d) Responsibility for fixing local tax levies.

- (e) Responsibility for employing, paying, and dismissing teachers.
 - (f) Studies and activities required.
 - (g) Responsibility for selecting textbooks.
 - (h) Transportation. Indicate responsibility for selecting drivers, for fixing salaries, and for planning routes. Indicate when transportation began to develop in various types of districts, when it was authorized by law in respective types of districts, and trace trends.
 - (i) Buildings and equipment. Indicate responsibility for authorizing capital outlay expenditures, for selecting sites, approving plans, recommending purchases, and hiring employees.
 - (j) Supplies. Indicate how supplies have been requisitioned and purchased.
 - (k) School funds. Show any changes in supervising collection and expenditure of funds. For example, during the early history of the State, school funds may have been collected, accounted for, and spent by noneducational officials, while during recent years responsibilities along this line may have been given to educational authorities.
 - (l) Records. Indicate responsibility for keeping records regarding attendance, finance, etc.
 - (m) Reports. Show changes in responsibility for making reports.
 - (n) Boundaries of districts or administrative units. Trace developments in procedures or methods of changing boundaries or of forming new districts.
8. *Minimum standards.*—Indicate steps in establishing minimum standards to be observed by local administrative units and trace responsibility for checking observance of those standards. Developments in minimum standards for such items as those listed under 7 above should be traced. For example, if there were no standards at all for the superintendency during the early history of the State and if some years ago the State began to establish standards for superintendents through certification or otherwise, these trends should be noted.
9. *Tables and charts.*—Separate tables and charts should be prepared for each major type of administrative unit. State summaries should also be prepared. Data by 10-year intervals should be used if such data are available over several decades. If not, data by 5-year intervals during recent decades should be used. The following tables and charts, considered essential, should be prepared as indicated so that comparisons may be made among States. Supplementary tables and charts undoubtedly will be found desirable in most States.
- (a) Number of administrative units of each major type by 10-year intervals.
 - (b) Number of teachers employed in each major type of administrative unit by 10-year intervals.
 - (c) Number of pupils enrolled in each major type of administrative unit by 10-year intervals.
 - (d) Number of administrative units by area by 10-year intervals.

- (e) Number of administrative units by assessed wealth per school census child by 10-year intervals.
 - (f) Monthly salaries of elementary (and high) school teachers by 10-year intervals.
 - (g) Unit cost of transportation by 10-year intervals.
 - (h) Unit current expense costs by 10-year intervals.
 - (i) Percent of total current expenses devoted to teachers' salaries, to transportation, and to all other current expenses by 10-year intervals.
 - (j) Amount and percent of school funds received from Federal, State, county, and local sources by 10-year intervals.
 - (k) Indebtedness for school purposes by 10-year intervals.
10. *Significance for future organization.*—Interpret the significance of these trends as related to the possible development of local school administrative units in the State.

C. *Local school fiscal units.*

1. *Characteristics of early fiscal units.*—Show whether early financial units were coterminous with attendance areas or administrative units, or if they were not coterminous, give the distinguishing features.
2. *Trends and size of financial units.*—Call attention to conditions that have encouraged development of larger units and explain such trends.
3. *Tax limitations.*—Indicate changes in authorization of tax levy for the current school program, for bonds, or for both. If any limitations have been set by constitution or by statutes, these should be traced fully.
4. *Fiscal status.*—Determine whether tax levies, budgets, or other materials have at any time had to be approved by any agency other than the board responsible for administering the financial unit.
5. *Tables and charts.*—Separate tables and charts should be prepared for each major type of fiscal unit. Data by 5- or 10-year intervals should be used. The following are considered essential:
 - (a) Number of fiscal units of each major type by 10-year intervals.
 - (b) Number of fiscal units by tax levied for current expense and for debt service by 10-year intervals.

The Legislative Program

LIMITATIONS OF PRESENT LAWS AND PRACTICES

Nearly every State has some laws which present difficulties to the needed modification of local school units. When existing school administrative units are small and when a majority vote of the electors of each district rather than of the total area involved is required before larger units may be formed, progress is likely to be slow.

Existing obstacles to needed modification of local school units should be classified so that those that may be overcome without resorting to legislation may be distinguished from those that can be overcome only by changes in legislation. Some of these are local and special and thus are of significance only in the community in which they exist; others are of Statewide concern. All handicaps will be traceable to constitutional or legal provisions, including regulations of the State board of education, and to custom and tradition.

Amending the constitution usually presents a more serious and difficult situation than modifying existing laws. An example of a difficulty encountered in some States is found in the constitutional provision for the election of county superintendents by popular vote. Other examples are the prescription in the constitution of existing administrative units and the constitutional provisions that State funds be used exclusively for limited purposes, as teachers' salaries.

Difficulties or handicaps, traceable to statutory prescriptions, should be analyzed to determine those which affect, respectively, attendance areas, administrative units, and fiscal units. Each handicap should be studied to determine its significance to a given phase of the program and its relationship to other handicaps applying to the same or other phases of this program. Particular attention must be given to legal provisions such as the following:

Attendance areas.

- (a) Restriction of boundaries to those of administrative units and possible further restriction in changing boundaries of individual areas except by vote of the people.
- (b) Location and scope of schools determined by agency other than board of education.
- (c) Decision for locating school buildings by agency other than board of education.

Administrative units.

- (a) Cumbersome procedures for making boundary changes.
- (b) Practical impossibilities of changes in boundaries without new legislation because of existing restrictions.
- (c) Limitations and/or prescriptions by law of services provided.
- (d) Premium placed on independence from State or other supervision regardless of efficiency of local administrative units.

Fiscal units.

- (a) State aid discourages needed reorganization by placing a premium on preservation of present status.
- (b) No local initiative to go beyond minimum program.
- (c) State support not provided on equalized basis.
- (d) Provision for assuming bonded indebtedness not conducive to reorganization.

Some existing regulations of the State board and department of education (and possibly of local boards of education) may not facilitate desired improvements in local school unit organization. A study of the application of all regulations to determine the effect of each on the entire program of education should be made. Effects on the proper organization of functions of the several types of units should be listed and classified.

Handicaps arising chiefly through custom and tradition may originate from groups representing vested interests. To eliminate these usually involves a program of educating school patrons and citizens to comprehend the needs for changes proposed and to appreciate that the effects of such changes will mean improved educational services.

POLICIES TO BE FOLLOWED

The information revealing existing obstacles to improving organization will be of assistance in the determination of policies and procedures to be followed (1) in preparing constitutional or legal revisions necessary to overcome these obstacles and (2) in educating the citizenry, including legislators, to recognize the need for the changes proposed.

Failure to recognize principles, such principles as set forth in the committee report on page 99, and to accept the guidance and combined judgments of educators and lay leaders in developing desirable legislation are often responsible for concerted opposition to and indefinite postponement of a program proposed and designed for improving educational services. Experience shows that effective results may be expected if recommendations together with supporting evidence are prepared and submitted by educational leaders to competent advisory committees selected because of their knowledge of and interest in educational problems. Out of such carefully planned discussions and consequent considerations should come policies and procedures which can be readily defended.

The National Conference on Financing Education indicates the following as meritorious methods of providing for reorganization of local school units:¹

- (1) Provision should be made for the State-wide planning of local school units and the location of school facilities. Such plans may be formulated through a central planning board or commission and may or may not be compulsory. Preferably the power to act on the matter of the execution of plans should be left to local authority. In all cases provision should be made for the cooperation of local authorities and leaders in the plans for reorganization.
- (2) Local school units may be created directly by the legislature itself by declaring that school units shall be coterminous with certain political subdivisions, as county, town, township, or city, or it may lay the entire State off into school subdivisions in accordance with any plan that may be chosen (barring, of course, constitutional limitations).
- (3) The legislature may delegate the authority to create, alter, and reorganize local school units. This is usually done by authorizing some local board or commission, such as the county board of education, to act in such matters. Boards may be created or designated as the exigencies of the situation in a given State may require. The most common methods of exercising delegated powers are listed in order of preference as follows:
 - (a) The board may be given discretionary power to create, alter, and reorganize districts within its jurisdiction, as in North Carolina.
 - (b) The board may be given discretionary powers to create, alter, and reorganize districts within its jurisdiction, when authorized to do so by a petition or an election, its power to act being determined by a majority of the qualified electors in the territory affected.
 - (c) The board may be required to create, alter, or reorganize districts when a proposed plan has been approved by a majority of the qualified electors in the territory affected.
 - (d) The board may have power to act in the creation, alteration, or reorganization of local units only when authorized to do so by a majority of the qualified electors in each district affected by the proposed plan. In view of the fact that this method makes it possible for a small minority to defeat the educational aspirations of large majorities, it should probably never be considered as a satisfactory method. Progress in reorganization has been slow and haphazard in States that have adopted it.
- (4) Laws concerning the creation, alteration, and reorganization of local school units should be specific and drawn in the light of court decisions in their provisions pertaining to notices, elections, disposal of property and obligations of old districts, provision for a board for new districts, and provisions as to the power to locate schools and provide for transportation of pupils.

¹ Report of National Conference on the Financing of Education. National Education Association. Washington, D. C., 1933. p. 46-48.

Since the population and resources and the means of transportation are subject to radical changes and modifications, the boundaries and areas of local units of school administration and control should be made flexible and subject to change as needs arise.

Procedures followed by States in effective reorganization vary considerably. For example, West Virginia in 1932 brought about a reorganization of all local school administrative units on a county-wide basis by legislative enactment. Ohio, on the other hand, has sought to obtain the same objectives by leaving the initiative for proposing plans largely to local school officials, although the State is given considerable authority to influence reorganization. Some States have provided special subsidies for situations which are considered desirable and have thus tended to encourage changes. Others have for one reason or another adhered rigidly to the principle that local initiative should be responsible for instigating and for bringing about all changes in local unit organization.

PROPOSALS RELATING TO THE DEVELOPMENT OF THE LEGISLATIVE PROGRAM

Revisions in existing laws, as well as proposed and additional laws, need to be carefully prepared. Proposed policies and principles which are to be incorporated in legislation should be justified on the basis of improved services to be rendered to the children and in terms of increased economy and efficiency in the operation of the schools.

Principles recommended for guidance in developing and presenting a legislative program were prepared by a committee of representatives from the 10 States attending the conference on the Study of Local School Units in Washington, D. C., in August 1936. This committee report follows:

PRINCIPLES AND PROCEDURES NECESSARY TO ASSURE PRACTICAL OUTCOMES FROM STUDIES OF LOCAL SCHOOL UNITS

THE LEGISLATIVE PROGRAM.

A. Introduction.

Conditions which prevail in each State will, to some extent, determine whether the proposed program can be carried out satisfactorily under existing laws, whether existing laws need to be amended, or whether new laws must be enacted. If laws are to be amended or new laws enacted, conditions and traditions in the State will, to some extent, determine the type of legislation which is most desirable to facilitate organization of satisfactory schools, attendance areas, and local school administrative units.

B. Principles relating to the legislative program.

In general, the following principles will be applicable in all States:

1. Proposed legislation should include all major principles relating to the organization of satisfactory schools, attendance areas, and local school administrative units, and should be carefully integrated and unified.

2. Insofar as possible, compulsory legislation should be avoided. The requirement for recommending the proposed organization should be placed on some county- or area-wide body such as the board of education. The principles to be followed in working out any such proposed organization should be set forth in the law. Within the limits thus set, the State superintendent or commissioner of education should have authority to propose, subject to the approval of the State board of education, necessary standards and regulations; and to approve or disapprove, on the basis of data available from objective studies made under his supervision, the program proposed.
3. The financial program, particularly as it pertains to State support, should be an integral part of the entire legislative program relating to the organization of local school units. By no means should the system of State support tend to encourage (by subsidies or otherwise) the perpetuation of existing units; rather, it should give encouragement to the organization of attendance areas and local school administrative units which meet minimum desirable standards.
4. The program should be presented to the governor and to the legislature only after it has been fully worked out by the professional leaders and accepted as sound by the professional and civic leaders of the State. There should be no attempt on the part of small groups to force over the legislative program by high-pressure methods. The program should be fully explained to the governor and to the legislature and supported on its merits.
5. The following principles should be taken into consideration in developing the legislation regarding organization of satisfactory attendance areas and administrative units:
 - (a) Legislation should provide for a program to be developed in terms of both immediate and remote objectives so that the final steps may be kept in mind when the first step is being taken.
 - (b) The principles and standards proposed for the organization of administrative units should encourage units sufficiently large to provide, in general, a complete educational program including at least grades 1 to 12 within the unit. On the basis of evidence available at present, there seems to be no danger that units will become too large at any time in the near future. In most States the problem will be to develop units that are large enough to be efficient and economical.
 - (c) The plan for improving the organization of local school administrative units should provide for a complete educational program, including competent leadership, proper administration, and efficient control and accounting of school funds. Such a plan must properly safeguard local initiative.
 - (d) The plan for assuring the organization of satisfactory attendance areas and local school administrative units should provide an equitable and adequate basis of financing education and should contemplate the reduction of taxes on real estate whenever excessive. In some cases, this will mean the assumption on the part of the State of a much larger share of the total cost of public education.
 - (e) Legislation, if based on principles rather than including details, will and should be sufficiently flexible to permit adaptation to the various needs of the several counties or areas of the State.

- (f) Legislation relating to the alteration, creation, or formation of attendance areas and local school administrative units should be sufficiently specific and clear regarding notices and hearings on elections, petitions, elections, disposal of property and obligations, the provisions of a board for any new district, etc., that confusion and controversies will be avoided.
 - (g) Organization of satisfactory attendance areas and local units of school administration should be considered in relation to the problems of organization of all governmental units.
6. Insofar as possible, the proposed legislation, after being generally understood and accepted by the leading citizens, should be:
- (a) Endorsed heartily by the State board of education and the State council in States where such an organization exists.
 - (b) Understood and accepted by the governor.
 - (c) Explained by the proper persons to influential members of the legislature.
 - (d) Introduced in each house by an outstanding member of the legislature.
 - (e) Explained favorably to each member of the legislature by persons in whom he has confidence.
 - (f) Fully explained by competent school officials and citizens to the committee to which it is referred.
 - (g) Followed carefully through both branches of the legislature and the governor's office.
7. There must be a definite plan for keeping the people in touch with the school program after legislation has been enacted and even after the proposed program has been put into operation. This plan is essential in order that misinterpretation may not gain credence and result in backward steps, and in order that the people in the various areas may be in better position to take advantage of opportunities provided through the program.

The Financial Program

NEED FOR A STATE FINANCIAL PROGRAM

It is becoming less and less likely that schools will be provided with additional support merely because it is requested. As the public is convinced that the school program has been scientifically and efficiently planned to render needed services effectively, adequate support is more likely to be forthcoming.

In every State there are some local school units or some practices which involve expenditures that cannot be readily defended. The existence of such units or of such practices makes the entire program of education more vulnerable than it would otherwise be. This publication has attempted to emphasize the fact that the basis for a study of local school units, as well as for studies of other phases of the program, is a comprehensive and carefully determined statement of objectives and standards. With this it is possible to determine in a State an efficient organization of local school units, to propose a minimum or foundation program for them, and to translate this program into costs. As this is done for each local unit in the State, evidence will be available to support successively steps in developing the program. The financial program can then be challenged only by challenging the objectives and standards of the studies. Attention can thus be directed more and more to the justification and acceptance of principles and standards. To the extent that these are accepted by the public, properly derived statements regarding needed school finance will be accepted without controversy.

ESSENTIALS OF A STATE FINANCIAL PROGRAM

The essentials of a State financial program were stated in the form of a school finance charter by the National Conference on the Financing of Education, held in 1933, as follows: ¹

SCHOOL FINANCE CHARTER

Essentials of a Modern School Finance Program

Believing that the financing of schools is a paramount public concern, basic to the present and future welfare of our democracy, the following program is offered for action by the American people.

¹ Report of National Conference on the Financing of Education. Washington, D. C., National Education Association, 1933, pp. 9-10.

Educational Opportunity

Universal education.—Funds to provide every child and youth a complete educational opportunity from early childhood to the age at which employment is possible and socially desirable. This right to be preserved regardless of residence, race, or economic status and to constitute an inalienable claim on the resources of local, State, and national governments.

Lifelong learning.—Educational opportunities at public expense for every adult whenever such opportunities are required in the public interest.

Effective teaching.—In every classroom competent teachers maintained at an economic level which will secure a high quality of socially motivated and broadly trained professional service.

Adequate Revenues

Equitable taxation.—For the adequate support of all governmental activities, including the schools, a stable, varied, and flexible tax system, providing for a just sharing of the cost of government by all members of the community.

Public information.—Accurate, intelligible, and frequent reports to taxpayers and the public on the management of the school money so that complete understanding and constructive attitudes with respect to school taxes and services may prevail.

Constructive Economy

School board independence.—In every school system a board of education responsive to the will of the whole people and free to adopt and carry out truly efficient and economical financial policies for the schools.

Economical administration.—A uniform and continuous policy of honest, economical, and productive spending of all school money.

Local Management

Adequate local units.—In every community trained educational leadership and other services secured through a local unit of school administration large enough to make such services financially possible and desirable.

Community initiative.—For every school district the right to offer its children an education superior to State minimum standards and to seek and develop new methods intended to improve the work of the schools.

State Responsibility

Equalization of educational opportunity.—For every school district, sufficient financial support from the State to permit the maintenance of an acceptable State minimum program of education and to relieve the local property tax when this tax, upon which local initiative depends, is carrying an unfair share of the cost of government.

Professional leadership.—Competent leadership in every State department of education so that reasonable minimum financial standards may be established and educational progress encouraged throughout the State.

Fiscal planning.—In every State a long-time financial plan for public education, comprehensive in scope, based on experienced judgment and

objective data, cooperatively developed, continually subject to review and revision, and reflecting faithfully the broad educational policy of the people.

National Interest

Open schools.—For every child deprived of education by emergency conditions beyond the control of his own community and State, immediate restoration of these rights through assistance from the Federal Government to the State concerned.

Federal support.—Sufficient Federal support for the schools of the several States to protect the Nation's interest in an educated citizenship, without Federal control over State and local educational policies.

SOME ESSENTIAL DIFFERENCES

As the financial program necessary to provide adequate educational opportunities in any properly organized local school administrative unit is being determined, a number of very important differences must be made if confusion is to be avoided. Practically all changes in organization of local school units are accompanied by changes in costs, gross and unit. These changes are likely to become associated in the minds of the public to such an extent that the reorganization may be held responsible for all changes in costs. The following important distinctions should be noted.

1. Improved services and facilities are practically certain to result in increased gross and unit costs unless savings in excess of such increase can be effected as a direct result of changes in organization. Changes in costs chargeable directly to better services or facilities should by all means be noted. For example, salaries of teachers in small inadequate units are likely to be low. Regardless of reorganization, increases in salaries may be highly desirable. Increasing lengths of terms may be expected to increase costs. Improvements in services and additional services should be clearly pointed out and associated with the costs involved.

2. When no changes in services are involved, changes in the organization of units will in many cases result in a decrease in costs. For example, if three 1-teacher schools with an average of 10 pupils each are combined with a larger school, it may be possible for the larger school to absorb these 30 pupils without additions to its teaching staff. Thus the salaries of three teachers would be saved as a result of the change in organization. Even if there is some transportation expense charged against the reorganization, there would still be a marked net saving. Furthermore, if three small administrative units are combined, it may be possible to eliminate expenses and per diem of all board members or other lay officials in two units (on a State-wide basis such a procedure might result in a marked saving). The salaries of the superintendents of two of these units would be saved and even though the salary of one superintendent might be increased, there would be a marked net saving directly attributable to the reorganization.

The following procedure may be used for differentiating between gross and unit costs attributable to improved services and those costs or savings attributable to reorganization. Find the gross and unit costs for:

- (1) Present program (services) in present organization of units.
- (2) Present program (services) in proposed organization of units.
 - (a) The administrative and fiscal units.
 - (b) Attendance areas (schools).
 - (c) Both administrative units and attendance areas.

NOTE: Find differences in costs due to reorganization alone as follows:
Item 1 minus Item 2(a)—differences due to reorganization of administrative units.

Item 1 minus Item 2(b)—differences due to reorganization of attendance areas.

Item 1 minus Item 2(c)—net or total differences due to reorganization.

- (3) Proposed minimum program (services) in present organization of units.
 - (a) Administrative units.
 - (b) Attendance areas.
 - (c) Both administrative units and attendance areas.

NOTE: Find differences in costs due to added services alone as follows:
Item 1 minus Item 3(a)—differences due to added services for administrative units.

Item 1 minus Item 3(b)—differences due to added services at schools.

Item 1 minus Item 3(c)—differences due to added services.

- (4) Proposed minimum program (services) in proposed organization of units.
 - (a) Administrative units.
 - (b) Attendance areas.
 - (c) Both administrative units and attendance areas.

NOTE: Find differences in costs due to added services and proposed reorganization of units as follows:

Item 1 minus Item 4(a)—differences due to added services and reorganization of administrative units.

Item 1 minus Item 4(b)—differences due to added services and reorganization of attendance areas.

Item 1 minus Item 4(c)—net differences due to added services and reorganization.

Complications may be encountered in States in the process of determining these differences in costs in different States. For example, the length of term may vary in the schools of an administrative unit or of the administrative units to be combined. It is possible, however, to determine costs as indicated in each of these steps so as to show with reasonable accuracy how much would be added or saved. The differences in costs due to changes in organization can thus be fairly clearly differentiated from those due to increased services.

As pointed out by the National Conference on the Financing of Education:³

³Ibid., pp. 48-49.

✓ (a) General statements equally applicable to all situations as to whether reorganized local school units will be more expensive or less expensive than the original units cannot be made. The expensiveness of any proposed plan can be discovered only by a study of the area in question. The following statements appear to hold good.

- (1) In wealthier agricultural and industrial areas the reorganization of local school units can result in the same character of schools as before reorganization for less expenditures or in better schools for the same expenditures, and frequently for even less expenditures.
- (2) In many areas the reorganization of local schools can result in adequate schools only through the expenditures of greater sums of money. This situation is almost invariably true in the poorer economic areas, because such areas do not now have adequate educational facilities.
- (3) In all cases better educational facilities, though not adequate opportunities, can be obtained for the same expenditures under reorganization as under the present organization of small units.
- (4) The reorganization of local school units, especially internal reorganization, which results in the establishment of larger schools often does not require the construction of new buildings. It merely becomes a problem of fully utilizing the buildings already constructed. In other cases it will become necessary to re-house the reorganized schools and in such cases funds for capital outlay will have to be provided. Such expense is not always a net additional expense for the reason that the economies in current operating expense resulting from reorganization frequently offset the annual expense required for debt service.
- (5) The reorganization of schools in rural areas usually results in an increased number of children transported to school. The reorganization, however, often results in economies in other current costs that offset the increased cost of transportation. Certain factors concerning the expected cost of transportation of pupils are of vital concern to this problem.
 - (a) As the number of pupils transported increases, the cost per pupil decreases assuming that distances remain fairly constant.
 - (b) The number of pupils transported is of much more importance in determining the cost of transportation than the number of miles those children are transported. Distance, within the limits of the feasibility of transporting children, is a relatively unimportant factor in the cost of transportation.
 - (c) Almost invariably it is less expensive to transport children in buses owned and operated by the school districts than in buses contracted for from private individuals.

- (b) The chief results to be expected from the reorganization of local school units are as follows:
- (1) More adequate elementary school opportunities.
 - (2) More adequate high-school opportunities.
 - (3) More adequate opportunities for other educational services.
 - (4) Lower per pupil costs for equal or better services.
 - (5) Increased probability of securing at an economical cost more adequate administrative and supervisory services.
 - (6) The simplification of the problems of the apportionment of State school funds and the equalization of educational opportunities.

DETERMINING STATE SUPPORT NEEDED

The National Conference on the Financing of Education submitted the following recommendations concerning financing a minimum or foundation program of education:³

1. Equalize educational opportunity and the cost of its support up to a reasonably satisfactory minimum from State funds.

2. Determine through a study of actual conditions and practice within the State the scope and character of a proper minimum or foundation program.

3. Develop a measure of educational need which will assure that the foundation program will purchase substantially the same amount and quality of education in every school district.

4. Include a local contribution, based on uniform effort by all localities, as well as State support, in financing the foundation program.

5. Do not reduce existing State support when the State undertakes the financing of the foundation program.

6. Consider the foundation program as one to be raised from time to time toward a more adequate level.

7. Take into account nonresident tuition, transportation of pupils, and capital outlay in determining the cost of the foundation program.

8. Interpret the foundation program to the people clearly and effectively.

If these recommendations are followed, together with the recommendations in this publication, for organizing adequate local school units and for determining the cost of a complete and balanced educational program in each of those units, the amount of State funds needed to assist in supporting the program in each of the proposed administrative units, as well as in the entire State, can be determined as follows:

1. Find the total cost of the minimum or foundation program in each of the proposed administrative units by determining the amount needed for salaries of teachers, transportation and other current expense, and capital outlay. Composite weighted units may likewise be used in arriving at the total. There may be some merit in determining salaries of teachers separately if some control is needed to safeguard teachers' salaries from encroachment on account of funds needed for other func-

³ Ibid., p. 13.

tions. However, if a complete program, including transportation, as well as capital outlay, is established as herein recommended, the need for safeguards to prevent encroachment on teachers' salaries should be reduced to a minimum. The amount needed for transportation in any administrative unit will probably not be proportionate to the amount needed for other phases of the program. A transportation saturation index can be calculated by finding the ratio between the pupils transported to the proposed school centers at the present time and the minimum to be transported as shown by the spot maps. Unit costs and the total amount needed for transportation can then be calculated largely in terms of density of transported population with necessary corrections for other related factors.⁴ Capital outlay needs will be, over a period of years, proportionate to the amount needed for salaries of teachers and can readily be calculated.⁵

2. The tax levy or rate of tax income which is to represent the uniform effort by all local school administrative units should be determined and the income to be available from each unit should be calculated. (It is important that some margin in the way of local taxing effort be left to each local school administrative unit so that the program may be enriched as desired. If this is not done, the educational opportunities in some of the wealthy units are likely to be restricted with results that are unsatisfactory.) To this should be added any anticipated income from State funds apportioned on a per capita or any other than an equalization basis.

3. The difference between the cost of the minimum or foundation program and the funds considered available to meet that cost can then be determined. This will represent the amount of additional funds which must be provided by the State to make possible the equalization of the program proposed for the local school administrative units.

4. The total additional amount needed from the State by each local school administrative unit in order to carry out the proposed program can then be determined by adding the totals from step 3. The State funds which are provided to meet the cost of the minimum program should constitute one appropriation rather than a series of appropriations for special earmarked functions. The matter of assuring a balanced program and of safeguarding the amount that should be devoted to any one phase of the program can be cared for by general principles written into the law. The amount set aside by the State must obviously be an elastic amount which will vary as the needs of the local administrative units vary. A fixed appropriation might be fatal to the continuation of a minimum program. It is not within the province of this discussion to attempt to designate tax sources from which revenues for the minimum program should be derived.

JUSTIFICATION OF FUNDS NEEDED

If the foregoing procedures are followed, the State can determine objectively the amount of State funds needed and the basis for apportioning these funds to support a minimum or foundation program, and be in position

⁴ Morphet, Edgar L. A technique for determining teacher and transportation units for a minimum or equalization program. In *Reconstructing education through research*, p. 96-101. Official report of the American educational research association. Washington, D. C., National education association, 1936.

⁵ Capital outlay in the school finance program. *American school board journal*, 94:19-20 and 99:95:10021, June and July 1937.

to justify the entire program without reservations. All calculations can be entirely objective and can be used to prove conclusively the need as long as the minimum standards and objectives on which the program is based are accepted. It is assumed, of course, that in addition to proposing the most satisfactory organization of local school units and preparing a minimum program on this basis, the State will take whatever steps are necessary to carry out recommendations concerning constructive economies in addition to such as those proposed by the National Conference on the Financing of Education :⁶

THE STATE AND CONSTRUCTIVE ECONOMIES IN EDUCATION

1. Safeguard all school funds, whether endowments or current funds, through proper selection of depositories and other methods.
2. Establish such times and methods for distributing State school funds as will best meet the financial needs of the local school system.
3. Promote economical and efficient budgetary procedure in local school districts.
4. Put into practice a comprehensive system of accounting and auditing.
5. Set up centers of instruction or develop other methods by which accounting procedures can be improved and unified.
6. Centralize all internal accounting in each local school system.
7. Provide for an effective annual audit in each administrative unit.
8. Provide a competent instructional staff in order to guarantee the educational efficiency which is fundamental to true economy.
9. Provide adequate research and supervisory services as a safeguard in maintaining instructional efficiency and economy.
10. Set up specifications to assist local districts in economically purchasing school supplies, equipment, and fuel.
11. Provide for adequate training of janitors, custodians, engineers, and other employees, responsible for school building operation and maintenance.
12. Make studies that will help in keeping costs of transportation of pupils to lowest level consistent with efficiency, comfort, and safety.
13. Study the possibilities of economies in insurance costs.
14. Develop budget forms, contractual documents, and standards for specifications of school buildings.
15. Require a complete financial report on the completion of every school building.
16. Improve State and municipal building codes as these apply to school buildings.
17. Set up methods in each State to supervise the issue and marketing of local school bonds.

⁶ Report of National Conference on the Financing of Education. Op. cit. pp. 15-16.

The justification for the State program of education and for the financial support needed can then be stated in terms such as the following:

1. Children in all parts of the State will be assured minimum services needed to provide adequate and equitable educational opportunities.
2. Inequalities and complications attendant upon the levying of non-resident tuition fees will be entirely unnecessary and can be eliminated.
3. Economical operation of all local school units will be reasonably safeguarded by the proposed organization supplemented by the State financial program and the procedures which are established for assuring constructive economies in education.
4. Local school administrative units will be able to use, if they so desire, local funds over and above those needed for the minimum or foundation program to carry on an enriched or expanded program.

SELECTED BIBLIOGRAPHY

Many of the documents issued by public education authorities are free. Many of the materials can be borrowed from the libraries of State universities, State historical societies, the Office of Education, United States Department of the Interior, or the Library of Congress. An asterisk (*) preceding an item indicates that an interlibrary loan can be made from the Library of the Office of Education where a copy is on deposit.

Availability of data.—A surprising volume of data has been assembled on the present status of school districts in individual districts, States, and regions during the past few years. The beginning studies in State school administration show various points of emphasis and attack in studying school administration. As pointed out in the October 1934 issue of the *Review of Educational Research* a broadening of the scope of the bibliography therein to include items related to the problem of school organization was necessary to a complete consideration of the problem.

A stumbling block in the way of investigators was until recently the general unavailability of data that are comparable in content and delimitation. Terminology was loose, different items were reported, and the purposes of the studies were various. During the past few years the availability of comparable data increased as the references listed below show.

Arkansas, Arizona, California, Illinois, Kentucky, North Carolina, Ohio, Oklahoma, Pennsylvania, and Tennessee made and reported studies under the direction of the Office of Education; Colorado, Idaho, Texas, Utah, and Washington individually studied their present educational conditions, aided by Federal funds; Minnesota also studied 14 counties with Federal funds; and New York has recently reported the findings and recommendations of its Regent's Inquiry into the character and cost of public education in the State of New York.

The participation of the State departments of education in the program of uniform records and reports conducted by the Office of Education at the request of the council of chief State school officials reflects desirable outcomes of such cooperation in the data available today.

Out of the many studies in school administration those selected for this list show the diversity of techniques used, the scope of the data collected and presented, and the projection of plans of improvement, costs, etc.

It has been our hope to include recent major contributions to the literature in the field of State school administration relating to the organization of satisfactory units of attendance, administration, and finance, particularly those reflecting principles and procedures.

References covering certain phases of the problem have not been included but the following paragraphs should explain these omissions and point to sources of data.

Articles.—Many articles of merit appearing in the official organs of taxpayers' and education associations have not been included in the bibliography, yet it is highly desirable to call attention to this type of material, especially has that issued by the California Taxpayers' Association and the Illinois Education Association been particularly instrumental in arousing interest in the problems of school administration in the lay and school groups in those States.

Atlases.—The preparation of maps showing various items for districts, a necessary procedure in the prosecution of studies of local school units, has resulted in the accumulation of actual documents for State and county school officials and, in some instances, for interested individuals.

The 10 States participating in the local school units project have prepared maps for some or all of their units which are available for study in the State and county offices; some of these States have issued books of maps for the local superintendents and others interested in them. Many States have taken this preliminary step in an effort to "see" existing situations and study them more closely. For instance, New York has recently issued an atlas which includes all school districts in New York for 1937. The leading libraries in New York State have a copy of the atlas, each county clerk has on file the sheets for his county, and each school district superintendent has a copy of the map of his district.

The shape and size of school districts has long been the subject of study and comment. Minnesota issued recently (1935) a mimeographed sheet entitled "A sampling of Minnesota school districts relating to shape"; the individual State project reports (in the study of local school units) commented on the size and shape factors in relation to existing units; and New York's atlas definitely calls attention to these factors.

Basic texts in school administration.—Although not specifically listed, the fundamental works in school administration by Cubberley, the Engelhardts, Pittinger, Strayer, Swift, and others should continue to inspire and guide thinking and the philosophy of school administration.

Maps.—(1) Sources: A central information office has been established in the United States Department of the Interior, Geological Survey, Washington, D. C., for the purpose of collecting, classifying, and furnishing to the public information concerning all map and survey data available in the various Government agencies and elsewhere. (See also Government Printing Office Price List No. 53, "Maps. Government maps and directions for obtaining them.")

Maps of value in school survey work are the blue line prints of postal maps which show by symbol post offices, places, houses, schools, churches, roads, post-office routes, etc., available by purchase from the Post Office Depart-

ment, Washington, D. C. A list of local and county rural delivery and post-route maps is available from that department.

(2) **Reproduction:** The quantity needed, cost, and use of the map should determine the process used. Some processes are (a) multilith; (b) rotaprint; (c) planograph; (d) lithography; (e) photostat; and (f) blue printing (contact local lithographers, photostat and blue print makers, and local photographers).

Local and State school officials should contact governmental agencies in their own States to learn of available maps, equipment, and facilities and possibility of reproduction there.

Master's and doctor's theses.—There are on file in many of the libraries of the universities and colleges theses in the field of State school administration, a number of which are significant to those making studies of the local school unit. The number is too large to include all the references. A few representative ones are listed below.

Sociological and economic background data.—In any comprehensive study of the local school unit geography factors, of which population is one, are indispensable.

Indexes of socio-economic status may be designed to include many or a few factors, and these selections may cover the subject and each selection be considered representative by its author. There is little agreement, however, as to the truth and totality of the picture presented by the selected items. A glance at table 78 A, B, and C, in Office of Education Bulletin 1938, No. 10 reveals some of the items that may be considered pertinent in studying socio-economic status.

Reference on the various studies of ability and effort of school units to provide a total or minimum educational program have not been included in the bibliography.

Data from governmental sources.—Advantage should be taken of the materials available from local, State, and Federal Governmental agencies. The cooperative participation of these agencies is highly desirable and valuable to research.

In addition to those mentioned above attention is called to the following Federal agencies:

(1) *United States Government Printing Office.*—A general price list of public documents is not available, but numerous lists have been prepared on special subjects and any of these will be furnished free, on application, if the person interested will state the subjects concerning which information is desired. Address inquiries to Superintendent of Documents, United States Government Printing Office, Washington, D. C.

(2) *United States Department of Commerce.*—Other data necessary as background factors in studies of local school units showing population trends, composition, and distribution; national wealth and income; illiteracy; etc., are in publications of the Bureau of the Census and of the Bureau of Foreign and Domestic Commerce known as the Fifteenth Census of the United

States, 1930 (issued decennially) and the Statistical Abstract of the United States (issued annually) are obtainable by purchase from the Superintendent of Documents, United States Government Printing Office, Washington, D. C., and available for reference in most large libraries. (See Government Printing Office Price List No. 70, "Census Publications.")

(3) *United States Department of the Interior, Office of Education.*—Many publications of the Office of Education on various problems in local and State school administration related to the planning of effective school units are available by purchase from the Superintendent of Documents, United States Government Printing Office, Washington, D. C., and by interlibrary loan from the library of the Office of Education. Among these are the Biennial Survey of Education (for State and city school statistics); Bibliography of Research Studies in Education (annual compilation of research studies in education undertaken by universities and colleges, State and city school systems, and organizations known to be engaged in the study of special phases of education); National, State, and city surveys (the surveys made by the Office and bibliographies of such studies); lists of publications of the Office. (See also Government Printing Office Price List No. 31, "Education.")

Typewritten and printing bibliographies on various topics in school administration are available or are prepared by the staff of the Office of Education as need arises.

(4) *National Resources Committee.*—A complete list of the publications of the State and regional planning boards is available upon request from the National Resources Committee, Washington, D. C. Requests for the publications, however, should be sent to the respective State and regional planning agencies.

Regional and State planning board publications which will be helpful in the study of local school units as background or supplementary data are land-use, economic, and population surveys; planning primers; etc.

The published report.—To plan and to project the best reports it is necessary to consider many factors. In addition to comparability of data, the data should be presented in a clear and interesting manner. There are available many standard works concerned with the various phases of a report's production: Style, statistical presentation, graphic presentation, etc.; yet, even with today's interest in the illustrated magazine and report, it is surprising to find so many reports with no illustrations or with "illustrations" that do not illustrate. Pictures, charts, maps, and other illustrations are worthless if they do not follow generally accepted principles in their production and reproduction. Standard books are available and should guide us in our effort to improve the character and "style" of our reports.

ALEXANDER, CARTER, and COVERT, TIMON. Bibliography on educational finance, 1923-31. Washington, United States Government printing

office, 1932. 343 p. (Office of education, Bulletin 1932, no. 15, Vol. I, National survey of school finance.)

This bibliography does for the materials published from 1923 to 1931 what the Educational Finance Inquiry's bibliography did for the earlier years.

Lists more than 5,000 studies of school finance which appeared from 1923 through (September) 1931.

ALVES, HENRY F., ANDERSON, ARCHIBALD W., and FOWLKES, JOHN GUY. Local school unit organization in 10 States.- Washington, United States Government printing office, 1938. 334 p. (Office of education, Bulletin 1938, no. 10.) Bibliography, maps, charts, and tables.

This is one of the two reports issued by the Office of Education as a result of its cooperative study of 10 States in the Local School Units Project financed by the Works Progress Administration.

Individual State reports were published by Arizona (mimeographed), Arkansas, California, Illinois, Kentucky, North Carolina, Ohio, Oklahoma, Pennsylvania, and Tennessee (which see).

*Ch. XV: "Formulation of plans for the improvement of public-school organization," a part of which summarizes the proposed programs for the 10 States. The bibliography should be particularly helpful to those studying present status and projecting proposed organization.

AMERICAN EDUCATIONAL RESEARCH ASSOCIATION. School organization. Review of educational research (N. E. A.), 4: 357-68; 404-17; 417-25; 431-33; and 440-44, October 1934. Bibliography.

This number of the *Review of Educational Research* is a handy compendium of the chief facts on school administration and organization and is a guide to sources of more detailed data. School administration in this issue deals with the structure of the school system and its modifications in response both to social and administrative needs, treated genetically, and the literature is reviewed to July 1, 1934.

Ch. I: Units of school organization. William C. Reavis. pp. 357-68. Discusses the various types of administrative units showing origin, present status, advantages, and disadvantages.

Ch. IV: Organization of administration.

A. City school administration. Nelson B. Henry and Edward C. Bolmier. pp. 404-17. The authors point to the relative recency of research studies in the field of school administration. This section concerns boards of education, administrative officers, and types of administrative organization.

B. State school administration. Warren W. Coxé. pp. 410-17. Points out that most of the studies of the organization of State departments of education have dealt with the organization as set up in constitutions and laws and that few attempts have been made to go beyond the legal provisions to evaluate the way in which organization has functioned. This section concerns the State boards of education, the chief State school officials, and staffs of education departments.

C. County school administration. Warren W. Coxé. pp. 417-25. Calls attention to the variations in the definitions used to distinguish classes of administrative units within a State, that all counties in a State are not of the same kind of administrative units, and that studies by different authors do not agree in their classifications for entire States. This section concerns county boards of education, county superintendents, and staffs.

AMERICAN EDUCATIONAL RESEARCH ASSOCIATION. School organization. Review of educational research (N. E. A.), 7: 361-65; 394-411; 422; and 437-42. October 1937. Bibliography.

The broad scope of this review is consistent with the desirable connotation of "administration." The consideration of many factors is necessary to a true understanding of the present status of school systems and the projection of plans for their improvement.

Chs. I and V and the bibliography are particularly significant to a study of local school units.

Ch. I. Territorial units. pp. 361-65. Nickolaus L. Engelhardt and Harold W. McCormick. Discusses number of districts in the United States and types of local school units.

Ch. V. Organization of administration in territorial units. pp. 394-411: A. Cities. pp. 394-99. Jesse B. Sears. B. Counties. pp. 400-03. William C. Reavis and J. D. Logsdon. C. States. pp. 404-11. Nickolaus L. Engelhardt.

The topical treatment for the research in these three phases of administration is similar to that in the Review for October 1934.

The items in the bibliographies of this and the October 1934 issue of the Review (on topics related to A, B, and C, above) make a rather complete list of studies in State school administration.

*ARIZONA. STATE DEPARTMENT OF PUBLIC INSTRUCTION. A study of local school attendance areas and administrative units in Arizona. Phoenix. The department, 1936. 185 p. (mimeographed) maps, tables.

This is one of the State reports of the Local School Units Project. (See also: Arkansas, California, Illinois, Kentucky, North Carolina, Ohio, Oklahoma, Pennsylvania, and Tennessee.)

Gives 14 county plans of reorganization.

This study was made to determine the status of educational conditions in each county and school district in Arizona to serve as a guide in recommending an educational program which, when completed, should overcome many of the defects and inequalities of the present system, with little if any increase in annual expenditure, and tend to equalize and increase the educational opportunities of all of the children in the State. The information contained in the study should serve as a valuable aid and guide to future decisions on school organization.

*ARKANSAS. STATE DEPARTMENT OF PUBLIC INSTRUCTION. A study of local school units in Arkansas. Little Rock, The department, 1938. 214 p. maps, charts, tables.

This is one of the State reports of the Local School Units Project. (See also: Arizona, California, Illinois, Kentucky, North Carolina, Ohio, Oklahoma, Pennsylvania, and Tennessee.)

The general purposes of the Arkansas Local School Units Study were: (1) to collect, organize, and analyze data concerning present schools and school administrative units; (2) to formulate standards and plans for the reorganization of existing administrative units into more effective school units; and (3) to ascertain and plan for the needs of the future school program of Arkansas.

The study embraced the 75 counties of the State. As an outgrowth of the study made in each county, proposed programs of reorganization were developed. Nearly all of the county programs have been completed. Some are available in typed form; others in mimeographed form. Complete data, including the proposed reorganization, for all counties are on file in the State department of education.

The report listed here gives data for the existing 3,134 administrative units and gives in summary form the present and proposed programs for three typical counties selected to show different situations and conditions and are indicative of the 75 reports on file in the State department.

***AXTELL, PAUL H.** Judicial determinations affecting the power to create and alter school districts in the United States. Doctor's thesis, 1933. New York university, New York, N. Y. 244 p. ms. \

Outlines limitations in connection with Federal constitution and State constitutions.

Uses material taken from primary sources based on the decisions of judges in cases which have come before courts affecting the power to create and alter school districts.

BRISCOE, ALONZO OTIS. The size of the local unit for administration and supervision of public schools. (Doctor's thesis, 1934.) New York, Bureau of publications, Teachers college, Columbia university, 1935. 110 p. (Contributions to education, no. 649.)

An analysis of the relation between the size of the local unit for public-school administration and supervision and the economical administration and supervision of the schools.

Data were obtained from reports of investigations of public-school systems in 13 different States, from reports of the State department of education in 10 different States. Data indicate that units employing 200 teachers or more provide control most economically, but that units employing from 70 to 80 teachers may provide adequate control by using a relatively low percentage of current expense for the purpose. The proportionate cost of adequate control is comparatively high in units employing 40-60 teachers, and becomes prohibitive in the typical unit employing fewer than 30.

***CALIFORNIA. STATE DEPARTMENT OF EDUCATION.** Study of local school units in California. Sacramento, The department, 1937. 137 p. maps, charts, tables.

This is one of the State reports of the Local School Units Project. (See also: Arizona, Arkansas, Illinois, Kentucky, North Carolina, Ohio, Oklahoma, Pennsylvania, and Tennessee.)

The report sets forth pertinent information on present status of school district organization in California. In order to develop adequate comparisons between the large and the small units in respect both to administrative units and attendance areas, illustrative proposals for such units in 15 representative counties in California are set up.

Complete reorganization proposals formulated by the California staff of this study have been presented in separately prepared county reports, which are on file in the State department.

CARR, WM. G. Efficient unit of administration. Educational research bulletin (N. E. A.), 9: 238-44, September 1931.

Cites typical recommendations from State school surveys emphasizing the need for thinking of education in terms larger than the small rural district, lists the principal larger units in use or proposed at present: and presents characteristics of a good unit for rural school administration; but points to the necessity for research as to the effectiveness of various types of local school units.

CHAMBERLAIN, LEO M., and MEECE, LEONARD M. The local unit for school administration in the United States. Lexington, College of Education, University of Kentucky, 1936. 44 plus 56 p. (In two parts.) (Bulletins of Bureau of school service, vol. viii, nos. 3 and 4, March and June 1936.)

Pt. I. Describes the scope and character of the investigation and includes a survey of the basic and intermediate units for school control in use in the 48 States; an analysis of these units in terms of area, school population, teaching staff, and other related factors; and an interpretation of existing conditions on the basis of an 8-division classification of the local organization for school management.

Pt. II. Includes maps of typical systems and diagrams showing the organization for school control in these systems. In addition it shows the relationships existing between the local organization for school control and certain measures of school efficiency. Finally, it furnishes an analysis of the trends in reorganization of the local unit for school administration.

COVERT, TIMON. An annotated bibliography of studies pertaining to the county unit of school administration. Washington, Office of education, 1930. 16 p. Mimeographed. (Circular no. 12.)

This bibliography lists more than 100 published studies pertaining to the county unit of school administration.

— Educational achievements of one-teacher and of larger rural schools. Washington, United States Government printing office, 1928. (Office of education, Bulletin 1928, no. 15.) 23 p.

A survey of studies on this problem; reveals that larger rural schools are consistently better in educational achievements than small schools.

— Good references on consolidation of schools and school districts. Washington, United States Government printing office, 1934. 10 p. (Office of education, Bibliography no. 27.)

Contains a list of 60 relevant items.

— Larger units for educational administration a potential economy. Washington, United States Government printing office, 1933. 43 p. (Office of education, Pamphlet no. 45.)

Compiles excerpts from official survey reports on economies resulting from reorganization and on possible savings from the establishment of other reorganizations.

CYR, FRANK W. Needed research on the reorganization of school districts in rural areas. New York, Bureau of publications, Teachers college, Columbia university, 1937. 23 p.

Reprinted from Teachers college record, 38: 293-315, January 1937.

This pamphlet should provoke serious thinking on the problems of State school administration. The author calls attention to the factors to be considered in the reorganization of attendance areas and administrative units; what research has been done; and that further research is needed into educational aims and philosophy as they affect reorganization of administrative structure.

DAWSON, HOWARD A. Satisfactory local school units—Functions and principles of formation, organization, and administration. Nashville,

Division of surveys and field studies, George Peabody college for teachers, 1934. 180 p. (Field study no. 7.)

Discusses the place and function of the local school unit in public-school administration, the characteristics of a satisfactory school, satisfactory administrative and supervisory organizations, size of a satisfactory local unit of school administration, status of local school attendance and administrative units, the reorganization of local school units, the local school unit and school finance, and the results of the reorganization of local school units.

DEFFENBAUGH, W. S., and COVERT, TIMON. School administrative units with special reference to the county unit. Washington, United States Government printing office, 1933. 25 p. (Office of education, Pamphlet no. 34.)

Outlines principal legal provisions relating to school administration in States having some or all counties organized on county unit or semicounty unit plan; presents principal statutory provisions for county school taxes; gives general description of "district" and town or township administrative units; and gives data on total number and size of school units and number of school board members in each State.

EDWARDS, NEWTON. The courts and the public schools. Chicago, University of Chicago press, 1933. 591 p. (Social science studies, no. 28.)

Chapter II is a comprehensive treatment of district organization and control with particular attention to the legal principles governing the creation of school districts, the alteration of their boundaries, and the effect of such changes on pre-existing assets and liabilities. Other chapters deal with the legal status and authority of school and district officers.

ENGELHARDT, FRED. The need for larger school district unit. *In* For Minnesota schools (Bulletin of Minnesota education association, no. i.) p. 6-8. May 1934.

In citing the need for a larger local unit for the support and administration of public schools in Minnesota advantages from the county, as an example of a larger local unit, are definitely set forth. States that major changes in methods of distributing State funds to schools should demand reorganization of school districts and that planning of a newer type of school district organization should consider certain principles, which are listed.

— and others. District organization and secondary education. Washington, United States Government printing office, 1933. 208 p. (Office of education, Bulletin 1932, no. 17, National survey of secondary education, Monograph no. 8.)

Explains in considerable detail the development of present school district organizations—in part I for the United States; in part II for California; in part III for Illinois—with emphasis on the secondary. Includes legal provisions, costs, and plans that have been made for reorganization of secondary school districts.

HAY, HOMER W. Litigation caused by the creation, alteration, and dissolution of school districts. Doctor's thesis, 1934. University of Pittsburgh, Pittsburgh, Pa. (Abstract in: University of Pittsburgh. Abstracts of theses, researches in progress, and bibliography of publications, 10: 162-69.)

Analyses 1,700 court cases dealing with the creation, alteration, and dissolution of school districts in the United States. Cases before the courts indicate an evolution of statutory processes; 88 percent of the cases dealing with the consolidation of districts have come before the courts since 1914; statutes permitting annexation in rural districts are not as lenient as those providing for municipal annexation.

- ***HOLMSTEDT, RALEIGH WARREN.** Factors affecting the organization of school attendance units. Bloomington, Indiana university, 1934. 32 p. (Bulletin of the school of education, vol. x, no. 3, June 1934)

Presents data concerned with factors affecting the organization of school attendance units with special reference to Indiana; draws conclusions as to standards for the size of school, distance of transportation, and the size of the attendance areas; considers the functions of administration, supervision, and school support as they affect the size of the school unit; and points out the relationship between the school and other social services in the community as an important aspect of satisfactory school units.

- ***ILLINOIS. STATE DEPARTMENT OF PUBLIC INSTRUCTION.** Study of local school units in Illinois. Springfield, The department, 1937. 158 p. tables.

This is one of the State reports of the Local School Units Project. (See also: Arizona, Arkansas, California, Kentucky, North Carolina, Ohio, Oklahoma, Pennsylvania, and Tennessee.)

It is indicated in the preface to this report that although county reports in rough finished form covering the present status have been prepared and written for 55 of the 96 counties studied, 90 counties will be completed at the close of the project. (Six counties in Illinois were not included in this study.)

The purposes of this study are: (1) To discover and present important facts concerning the schools, pupils, teachers, and costs in the school system of Illinois; and (2) to work out and recommend a program of organization and finance, on the basis of present costs, which will afford improved school advantages to the largest number of children.

It is indicated also in the preface that this report is essentially preliminary and that the study of local school units will be continued by the office of the Superintendent of Public Instruction following the close of the project, and that reports will be printed and issued by the State office of public instruction as the work is completed.

Representative county reports included are for Adams, Douglas, Hardin, and Winnebago.

- KEESECKER, W. W., and SEWELL, FRANKLIN C.** Legal and regulatory provisions affecting secondary education. Washington, United States Government printing office, 1933. 114 p. (Office of education, Bulletin 1932, no. 17; National survey of secondary education, Monograph no. 9.)

As title indicates, this monograph primarily concerns secondary school administrative units. The laws affecting secondary education, however, embody those laws enacted for elementary education.

The second chapter is devoted to a brief analysis of the principal types of local school districts provided for by law and a general review of the various functions which such districts are authorized to perform.

Also gives summary of legal provisions relating to pupil tuition and transportation.

*KENTUCKY.- STATE DEPARTMENT OF EDUCATION. Study of local school units in Kentucky. Frankfort, The department, 1937. 126 p. maps, charts, tables.

This is one of the State reports of the Local School Units Project. (See also: Arizona, Arkansas, California, Illinois, North Carolina, Ohio, Oklahoma, Pennsylvania, and Tennessee.)

The purpose of this report is to trace briefly the development of public education in Kentucky up to the present time, to set up desirable minimum standards for the State's education program, to evaluate the present program in terms of these standards, to propose a more desirable educational program for the State in the future, and to suggest means of financing such a program.

Maps of 6 counties shown in report; final maps of all (120) counties and complete status data as of 1934-35 for Kentucky's 300 school districts are on file in the State department at Frankfort. Reports on present status and proposals for more than 60 counties were completed by May 1936.

*LITTLE, HARRY A. Potential economies in the reorganization of local school attendance units. Doctor's thesis, 1934. Teachers college, Columbia university, New York, N. Y. Teachers college, Columbia university, 1934. 78 p. (Contributions to education, no. 628.)

Analyzes data obtained from county reorganization surveys of 223 counties in 15 States concerning types of proposed consolidations of schools and the changes which those consolidations would make in the cost of schools. (Gives formulas for estimating the proportional cost of consolidated schools; the percentage of the original cost of the schools which can be saved through consolidation; the percentage of children requiring transportation; and the cost of transportation.)

MOEHLMAN, ARTHUR B. A technique for determining natural communities. In National council on schoolhouse construction. Proceedings of Thirteenth annual meeting, 1935. Nashville, Tenn., The council, 1935. p. 63-66.

Discusses briefly the 1935 survey of certain areas in Michigan (particularly the technique used in Washtenaw County) to determine possible variations in type of school organization essential to a general reorganization plan. Gives the outline of the complete survey of which sections 3 and 9 describe the natural community.

"The result [of the county study] was the division of the county (20 townships; 153 school districts; 70,000 people) into seven natural communities and one special social area created by a consolidated school district. In all except the two largest centers, the division between urban, farm, and nonfarm population is fairly good so that in terms of political possibilities the farmer would not be submerged. . . .

"The results of this experimental study will be used as a basis for more extensive survey of the entire State. It indicates definitely that the county does NOT make the best form of school district in thickly settled areas. It indicates definitely the need for a variety of flexible districts such as community, county, and region."

NATIONAL EDUCATION ASSOCIATION. A self-survey plan for State school systems. Research bulletin (N. E. A.), 8 (nos. 2 and 3): 53-86; 89-163, March and May 1930.

Pt. I. Checklists. Suggests 15 checklists and directions for their use: 3 on the child and his welfare; 6 on the teaching profession; 2 on State school finance; 1 on material equipment; and 3 on administration (1 of which is on State board and another on State department of education).

Pt. II. Discusses each checklist and each item therein and gives references to sources.

NEW YORK. Regents' inquiry into character and cost of public education in the State of New York. New York school district atlas. Albany, The regents, 1937., 450 p.

Shows boundaries of school districts, locations of schools, highways, railroads, rivers, mountains, and county lines.

***NORTH CAROLINA.** STATE DEPARTMENT OF PUBLIC INSTRUCTION. Study of local school units in North Carolina. Raleigh, The department, 1937. 191 p. illus., maps, charts, tables.

This is one of the State reports of the Local School Units Project. (See also: Arizona, Arkansas, California, Illinois, Kentucky, Ohio, Oklahoma, Pennsylvania, and Tennessee.)

The purpose of the study in North Carolina was: (1) To trace the historical growth and development of public education in the State from the local standpoint; (2) to determine the status of present educational opportunities; and (3) to offer suggestions and recommendations for the reorganization and improvement of existing facilities.

There are presented brief statements and statistical tables concerning the public schools of the State as a whole, and recommendations for their improvement. As representative of the present local status of schools, spot maps and descriptive expositions are given for several counties. It is indicated in the preface to this study that material of this kind will be made available to local school authorities for the other counties covered by this survey.

***OHIO.** STATE DEPARTMENT OF EDUCATION. Study of local school units in Ohio. Columbus, The department, 1937. 271 p. charts, maps, tables.

This is one of the State reports of the Local School Units Project. (See also: Arizona, Arkansas, California, Illinois, Kentucky, North Carolina, Oklahoma, Pennsylvania, and Tennessee.)

Three of the eleven purposes listed for this study are: Develop a program of school organization in each county, making specific recommendations on both school districts and schools, in order to assist the county boards of education in carrying out the provision of the School Foundation Program Act (1935); set up reorganization standards and apply them in the development of the individual county reports; and show clearly both the educational and economical advantages of the recommended program of reorganization.

Pt. I of this report consists largely of materials showing the development of elementary schools, high schools, and school districts in Ohio since its admission to the Union in 1803. This information is centered in chapters showing significant trends, minimum standards, and an evaluation of the present status of schools and school districts, and significant trends in the financing of public education in Ohio. Ch. VII summarizes certain recommendations made in each county report.

Pt. II, beginning with page 149, is A study of the public schools of Ashland County with recommendations for their future organization. This county report was selected by Ohio as representative of the 88 county reports on file in the State department of education. Many of the county reports were made available for distribution.

***OKLAHOMA.** STATE DEPARTMENT OF EDUCATION. Study of local school units in Oklahoma. Oklahoma City, The department, 1938. 392 p. maps, charts, tables.

This is one of the State reports of the Local School Units Project. (*See also:* Arizona, Arkansas, California, Illinois, Kentucky, North Carolina, Ohio, Pennsylvania, and Tennessee.)

Chs. I-IV concern present status of attendance areas and administrative units, trends, and an evaluation of present status. Chs. V-VII concern minimum standards, proposed programs for five typical counties and proposed State organization; the proposed financial program and estimated costs; and the proposed legislative program.

Oklahoma has on file in the State department data of the same type for each of its school districts.

***PENNSYLVANIA. STATE DEPARTMENT OF PUBLIC INSTRUCTION.** Study of local school units in Pennsylvania. Harrisburg, The department, 1938. 150 p. maps, charts, tables.

This is one of the State reports of the Local School Units Project. (*See also:* Arizona, Arkansas, California, Illinois, Kentucky, North Carolina, Ohio, Oklahoma, and Tennessee.)

The material in this report is a summarization of data concerning the present status of schools in Pennsylvania. Section V presents the proposals for reorganizing one county. Section VI concerns the proposed financial program. Section VII summarizes recent and proposed legislation affecting the merging of districts and the consolidation of schools.

Data are on file in the State department of public instruction for each county in Pennsylvania.

***TENNESSEE. STATE DEPARTMENT OF EDUCATION.** A study of local school units in Tennessee. Nashville, The department, 1937. 206 p. maps, charts, tables.

This is one of the State reports of the Local School Units Project. (*See also:* Arizona, Arkansas, California, Illinois, Kentucky, North Carolina, Ohio, Oklahoma, and Pennsylvania.)

The fourfold purpose of the Tennessee study is: (1) To trace educational trends in the State relating to local school attendance areas and to local school administrative units; (2) to formulate desirable minimum standards for guidance in the organization or reorganization of local school units; (3) to evaluate the present status of attendance areas and local school administrative units; and (4) to project a proposed educational program on the basis of desirable minimum standards.

Gives data showing present status and proposed organization for Tennessee's 95 counties. More detailed proposed program and maps shown for Cheatham County.

The State department has on file completed studies of many of the counties and several of these were made available for distribution.

TEXAS. STATE BOARD OF EDUCATION. Texas State-wide school adequacy survey. Austin, The board, [c. 1938] 1803 p. maps, tables.

This is the State report of the State WPA project in Texas. It is a State-wide survey of the schools throughout all counties (254) of the State, and, no doubt, the data constitute the greatest source of statistical information that has ever been gathered upon the subject of education in the history of Texas. The supporting data for the survey are on file for the ready reference of various public officials and interested citizens of the State.

The report includes findings from studies relating to public-school expenditures, to the status of the teaching personnel, to the availability of secondary school opportunities to boys and girls of Texas, and to the possibility of the organization of more satisfactory local school units.

The trend is definitely toward larger administrative units—county or district. Detailed studies made during the past 3 years of 30 counties indicate that the total

number of administrative units in the State might possibly be reduced to some three or four hundred.

The report states that "in order to plan school programs for any county it is necessary to weigh carefully and analyze closely the existing conditions", and "basic factual data revealing existing situations must be considered from the point of view of the State as a whole if the findings are to be of real assistance to Texas in establishing and maintaining a satisfactory system of public education."

UNITED STATES. DEPARTMENT OF THE INTERIOR. OFFICE OF EDUCATION. Reorganization of school units: A report of the proceedings of a conference called by the Commissioner of Education, Washington, D. C., June 17-19, 1935. Katherine M. Cook, *ed.* Washington, United States Government printing office, 1936. 91 p. (Office of education, Bulletin 1935, no. 15.)

Includes short bibliography.

The conference offered an opportunity to a group of school officials who have been or are now confronted with questions concerned with administrative reorganization to discuss their practical aspects and formulate accepted principles and guides to successful practices.

Four major topics with added consideration of allied questions formed the basis of the program: (1) Satisfactory local school units—principles involved and procedures desirable in securing such units; (2) the relationship between satisfactory local administrative units and school financing; (3) procedures and techniques involved in reorganization studies; and (4) legislation designed to achieve best results in reorganization of school administrative units.

UTAH. Report of the subcommittee on education to the Governor and State legislature: School finance study and A study of consolidation of Utah school districts. Salt Lake City, Investigating committee of Utah governmental units, 1936. 179 p. maps, tables, charts.

This report was prepared with the aid of Works Progress Administration Projects Nos. 272 and 275.

Sec. I. School finance study. J. R. Mahoney, pp. 11-118.

This study may seem almost wholly concerned with financial conditions of the school districts of Utah with reference to consolidation, yet it was intended at the same time to reveal the significant features of school finance for each district.

The study gives the advantages and disadvantages of consolidation in terms of finance, emphasizing that the significant features of the problem are evident only as conditions in each proposed consolidation are examined.

The author holds that in "considering a problem of this kind with enough seriousness to make it likely that something will be done about it, makes it highly important that we give consideration not only to our present situation but to conditions that may arise in the future" and adopt "a plan with flexible features such as will make it easy to adjust to changing circumstances."

Although some supporting data were omitted because of lack of funds for printing them, they are on file and may be made available in some form at a later date. The data omitted consisted of tables containing significant financial and other measurable features for each of the districts that would comprise new consolidated units.

It is proposed that the 40 districts be reduced to 11.

Sec. II. Consolidation of Utah school districts. Philo T. Farnsworth, p. 119-79. Presents comparative data on school consolidation in United States and Utah compared with 11 western States; a history of consolidation in Utah to present time; a detailed analysis of present conditions in the 40 school districts; and various plans and comparisons resulting from the findings.

APPENDIX¹

The following forms are suggested for the collection and tabulation of data necessary to study present status and to project proposed organization for local and State school systems and to insure comparability of studies made.

It is necessary and desirable in some instances to modify the forms to fit situations due to legal prescription and differing organization in the various States. If it is found that data are called for on the 6-3-3 plan of school organization and the 8-4 plan obtains in the State; or that data are called for by county instead of some other political subdivision or the administrative unit; or that additional forms are required to collect data called for on the summary forms, because such forms are not at present in use in the area studied; or that content of items or date of data supplied differ from the content and date called for; appropriate changes should be made since the forms readily admit them and in most instances carry suggestions pointing to these modifications. In order that the fullest value may result from the completed studies individually and collectively and that they may be useful in educational planning, any changes in, or variations from, the procedure suggested or the content of the items called for should be indicated clearly in footnotes.

One of the purposes of research studies is to furnish comparable data. The uniformity of the bases on which recommendations are made can be controlled if data are uniformly recorded and reported and if terminology is relatively fixed or is defined in the study.

In view of the progress made in the last quarter of a century in the program of the Office of Education and cooperating agencies toward uniform recording and reporting procedures and systems, attention is called to the revision of Statistical Circular No. 10, the definitions of terms, and the forms issued by the Office of Education.

¹ See ch. V.

FORM 1.—EDUCATIONAL DATA BY SCHOOLS BY ADMINISTRATIVE UNITS

County State Data for school year 19

Present administrative units and schools		Administrative officers and professional assistants	Members of board of education or other administrative board	Local school trustees	School census (6-17 years)			Average daily attendance	Membership			Number of teaching positions		Pupil-teacher ratio				
Number	Name				6-11	12-14	15-17		Total	Trans-ported pupils	Non-trans-ported pupils	Total	Men		Women			
1		3	4	3	6	7	8	9	10	11	12	13	14	15	16	17		
Number	Number of—		Total population			Area served (in square miles)	Numbers used for instructional purposes		Assessed valuation		School tax rate		Out-standing bonded indebtedness	Instructional costs				
	Grades taught	Days (length of term)	Months teachers were paid	Under 500	500-2,500		Over 2,500	Build-ings	Rooms	Total	Rate	Per census child		Total	Current expense	Bond and interest	Total	Per pupil in average daily attendance
1	18	19	30	31	22	23	25	26	27	28	29	30	31	32	33	34	35	36

1 See Office of Education, Statistical Circular No. 10, (revised March 1938), for definition of terms, classification of administrative units, etc.
 2 Supply these data as follows: On the first line write the name and the number of the district (administrative unit) and record figures representing item summaries, if there are two or more schools in the district. Immediately under the name of the district, write the names of the schools, using as many lines as there are schools, and record by schools those items applicable thereto. When the data for a given district have been recorded as indicated, skip a line and then proceed, in manner described, for the next administrative unit.
 3 Modify age limits as set by State law.
 4 Report by levels—elementary school, junior high school, and senior high school, or in accordance with existing organization in the State.
 5 Of administrative unit or attendance area, depending on line item. The first line for instance would be for the administrative unit, whether county, township, or other, and if more than one school is within its boundaries, each following line listing a school would be for that attendance area (that school).
 6 Percent that assessed value is of true or market value.

FORM 2.—ALPHABETICAL LIST OF PERSONS OF SCHOOL CENSUS AGES

Administrative unit County State Data for school year 19

Name of person ¹			Sex		Age at last birthday ³	School attainment		Distance from school (to nearest quarter mile)	Transportation furnished		Residence ⁴
Last	First	Middle	Male	Female		Grade in which now enrolled	Grade last attended if not now enrolled		Bus route number	Bus number	
1	2	3	4	5	6	7	8	9	10	11	12

¹ List names alphabetically according to surnames, by school; that is, if there is more than one school in the administrative unit, arrange alphabetically, the names of the pupils in the respective area for each school. Thus in a district with two schools, there will be an alphabetical list for each.
² On or prior to September 1, last.
³ Use best possible means of identifying location of residence of pupil, as street and number, village, township, range, section, and quarter section.



FORM 3.—FAMILY CENSUS BLANK

To Census Trustees: Read Carefully.

(1) If the parent, guardian, or person rendering the child is unable to write he shall make his mark to the left of his name when this is written on the card by the census trustee. If different surnames are in same family use separate blanks for each surname.
 (2) Enumerate only those children who will be 6 and under 18 years of age on September 1, 19... and who are residents of the district on the first day of April. Children born on or before September 1, 19..., or after September 1, 19..., must not be enumerated.

For White Scholastics Only.

Common } School District..... No..... County.....
 Independent }

Last name	First name	Birthday			Age Sept. 1, 19...		Blind ¹	Partially blind ¹	Deaf ¹	Partially deaf ¹	Speech defect ¹	Feeble minded ¹	Crippled ¹	Name of county in which family resided last April last
		Mo.	Day	Yr.	Male	Fem.								
.....
.....
.....

I hereby certify that, as far as I am able to answer, all requested information has been supplied, and that I am a resident of the district named above, and that the children whose names are given hereon are in my charge and custody, and have not heretofore been enumerated in this State for the scholastic year beginning September 1, 19..., and ending August 31, 19...

Name of Parents:

Father..... Last name..... First name..... Signed..... Parent, guardian, or person rendering child
 Mother..... Last name..... First name..... (Street and number or rural route) (City or town)

Subscribed and sworn to before me this day of March 19... (Give name of farm, if on farm)

¹ Check (✓) handicaps of children in columns provided.
² Instead of check (✓), use this code: S—Curvature of the Spine; F—Club Feet; P—Infantile Paralysis; L—Leg Amputation; A—Arm Amputation; W—Wheel Chair Cases. Census trustee.

(Courtesy of State Department of Education, Austin, Tex.)



FORM 4.—SCHOLASTIC POPULATION BY 5-YEAR INTERVALS

County State

Administrative unit		Scholastic population ¹ as of —					
Number	Name	1910-11	1915-16	1920-21	1925-26	1930-31	1935-36
1	2	3	4	5	6	7	8

¹ Includes all pupils within the school census ages. May be reported for each interval by age groups, as 6-11, 12-14, and 15-17.

FORM 5.—GENERAL POPULATION BY 10-YEAR INTERVALS ¹

County State

Administrative unit		Total population as of—				Percentage of gain or loss				
Number	Name	1900	1910	1920	1930	1900 to 1910	1900 to 1920	1900 to 1930	1910 to 1930	1920 to 1930
1	2	3	4	5	6	7	8	9	10	11

¹ Based on Federal census reports.

FORM 6.—ASSESSED VALUATIONS AND SCHOOL TAX RATES BY 5-YEAR INTERVALS

County State

Administrative unit		Assessed valuation				School tax rate											
Number	Name					For current expense				For debt service ¹				Total			
		1920	1925	1930	1935	1920	1925	1930	1935	1920	1925	1930	1935	1920	1925	1930	1935
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18

¹ Include only rates for bond and interest purposes.

LOCAL SCHOOL UNITS

FORM 7.—SCHOOL ENROLLMENT ¹ BY GRADES

Data for school year 19...-

County..... State.....

Administrative unit and school ¹		Enrollment by grades ¹															
		Grade						Total	Grade			Total	Grade			Total	Grand total
		1	2	3	4	5	6		7	8	9		10	11	12		
Number	Name																
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18

¹ Or membership.
² Record totals for the several schools on the line carrying the name and number of the administrative unit and the distribution of enrollment for each school on a separate line.
³ If schools are organized on a basis other than the 6-3-3 or the 6-6 plan, change to correspond to the existing organization.

FORM 8.—ENROLLMENT IN ELEMENTARY AND SECONDARY SCHOOLS BY 5-YEAR INTERVALS

Name and number of administrative unit.....
 County..... State.....

Item	1910	1915	1920	1925	1930	1935
1. Elementary schools:						
(a) Enrollment (grades ---)	2	3	4	5	6	7
(b) Increase or decrease ¹						
(c) Percentage increase or decrease ¹						
2. Secondary schools:						
(a) Enrollment (grades ---)						
(b) Increase or decrease ¹						
(c) Percentage increase or decrease ¹						

¹ From previous 5 years.

FORM 9.—AGE-GRADE DISTRIBUTION OF ELEMENTARY PUPILS¹ BY SCHOOLS ACCORDING TO NUMBER OF TEACHERS

Data for school year 19...-

Name and number of administrative unit.....
 County..... State.....

Type of school	Number of pupils			Percent of pupils		
	Underage	Normal age	Overage	Underage	Normal age	Overage
1	2	3	4	5	6	7
1-teacher.....
2-teacher.....
3-5-teacher.....
6-9-teacher.....
10-or-more-teacher.....

¹ What grades are included in elementary level?.....

FORM 10.—NUMBER OF MINUTES PER WEEK DEVOTED TO EACH SUBJECT IN EACH GRADE IN TYPICAL 6-TEACHER AND 1-TEACHER ELEMENTARY SCHOOLS

Data for school year 19...-

County..... State.....

Subjects	Grade in 6-teacher school ¹						Grade in 1-teacher school ¹					
	First	Second	Third	Fourth	Fifth	Sixth	First	Second	Third	Fourth	Fifth	Sixth
1	2	3	4	5	6	7	8	9	10	11	12	13
.....
.....

¹ If school organization in State includes grades above sixth as elementary modify the form accordingly.

FORM 11.—AGE-GRADE-PROGRESS DISTRIBUTION OF FIRST SEMESTER PUPILS IN MEMBERSHIP ON OR ABOUT JANUARY 8 1

Data for school year 19

(Name and number of school) { White
Negro

(Name and number of administrative unit)

City, County

Number of years in school previous to last Sept. 1	First-grade pupils								Second-grade pupils								Third-grade pupils								Fourth, etc.					
	Number of pupils who were of these ages last Sept. 1								Number of pupils who were of these ages last Sept. 1								Number of pupils who were of these ages last Sept. 1													
	Low first grade				High first grade				Low second grade				High second grade				Low third grade				High third grade									
40	5	6	7	8	9	10	Over 10	6	7	8	9	10	11	Over 11	7	8	9	10	11	12	Over 12	7	8	9	10	11	12	Over 12	8	9
41																														
42																														
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A B C D E F



D RAPID progress.
 E NORMAL progress.
 F SLOW progress.
 A UNDER age.
 B NORMAL age.
 C OVER age.

1 Data for making this tabulation are recorded in the register under the items "Age as of Sept. 1" and "Number of years in this grade previous to this year" for each pupil on pages 2, 14, 20, and 38 (see "model" teacher's register of attendance proposed by Office of Education in its program of uniform records and reports); or in school systems maintaining individual pupil cumulative record cards, from these cards.

The register defines "pupil age" and carries blanks for recording "Age as of Sept. 1" and "Number of years in this grade previous to this year" for each pupil. These register recordings are original data for making this age-grade-progress tabulation where the school system does not maintain individual pupil cumulative record cards.

Figures showing the number of pupils at various ages who have been in school various numbers of years should be inserted in the blank squares provided under each grade and represent the total number of pupils for the grade. For example: The upper left-hand blank square just to the right of "0" (years previous schooling) should show the number of pupils in the low first grade who were 5 years of age on last Sept. 1, and who had not been in school before that date; the next blank to the right should show the number in the low first who were 6 years of age and who had not been in school before; etc. Similarly, the second line "½" (years previous schooling) will show the number of pupils for the different ages given, who had been in school one-half year before last September 1; the third line "1" (years previous schooling) will show the number of pupils for the different ages given, who had been in school 1 year before last Sept. 1, etc. Consider for each grade (or half-grade):

1. The heavy horizontal lines designate the normal number of years in school. Those pupils of whatever age reported between these heavy horizontal lines are making NORMAL progress. Similarly, those in all spaces above the top heavy horizontal line are making RAPID progress, and those below the bottom heavy horizontal line are making SLOW progress.

2. The heavy vertical lines designate normal pupil ages within grades. Those pupils reported between these heavy vertical lines are NORMAL age pupils. Similarly, those reported to the left of the left heavy vertical line are UNDER age; and those to the right of the right heavy vertical line are OVER age.

3. Schools using the annual promotion plan report only for low first, low second, low third, etc., and omit all ½-year line items. Disregard time spent in the kindergarten (count time spent in other schools).

*Same as footnote 2.

FORM 12.—TRANSPORTATION OF PUPILS

Data for school year 19

County

State

Name and number of administrative unit	Bus routes										Number of pupils transported	Seating capacity of bus	Number of days transportation provided	
	Bus number	Route number	From	To	Number of miles one way				Total (cols. 6-8)	Average load				Maximum load
					Hard surfaced	Gravel	Graded	Total (cols. 6-8)						
1	3	3	4	6	6	7	8	0	0	10	11	12	13	

Name and number of administrative unit	Total miles of transportation furnished for which cost is carried in column 24	Buses owned, operated, and maintained by district										Cost by contract (buses not owned by district)	Payments in lieu of transportation	Total (cols. 24-26)
		Type of body					Cost							
		Steel	Wood	Open	Closed	Purchase price	Date purchased	Driver's salary	Operation	Maintenance	Total (col. 21-23)			
1	16	15	10	17	18	19	20	21	22	23	24	25	26	27

1 Miles reported by methods of transportation. See Form 8-054, table III-8, Office of Education.
 2 For each administrative unit proceed in this manner: Following the name of the administrative unit give in appropriate columns data for an individual bus and immediately following the data for this bus, list on separate lines the routes it serves and data concerning each route called for in columns 3 through 11 and the remaining buses and their routes.
 3 Check.



FORM 13. INDEXED STATEMENT OF INDEBTEDNESS

Data for school year 19...

Name and number of administrative unit

County

State

Give total indebtedness of administrative unit as of June 30, 19... \$

Date indebtedness was contracted (Month, day, year)	Date due (If serial issue write "serial" on line)	Rate of interest	Give amount by CHARACTER of indebtedness					Give amount by PURPOSE of indebtedness				
			Straight bond	Sinking fund bond	Serial bond	Warrants issued prior to July 1, and unpaid by that date	Other (specify)	Capital outlay for new construction or purchase of property	Refunding other bonded debt	Funding short-term obligations, current or floating debts	Current operations	Other (specify)
1	3	3	4	6	0	7	0	9	10	11	12	13

Date indebtedness was contracted (Month, day, year)	Amount outstanding	Amount of PRINCIPAL					Amount of INTEREST			Trustee or to whom payable
		Less than 6 months	6 months to 1 year	1 year to 2 years	More than 2 years	Less than 6 months	6 months to 1 year	1 year to 2 years	More than 2 years	
1	14	15	16	17	18	19	20	21	22	

1 Use one line for each item of indebtedness.



FORM 14.—SCHEDULE OF PAYMENTS FOR BOND ISSUES

Data for school year 19...-

Name and number of administrative unit.....
 County..... State.....

Bond issues and numbers ¹	Date contracted	Rate of interest	Date due	Principal	Interest	Total	Trustee or to whom payable
1	2	3	4	5	6	7	8

¹ Record information for the "First issue" on the first line, and on following lines, amounts (by bond numbers) maturing each year.

FORM 15.—SOURCES AND APPORTIONMENT OF REVENUE FOR SCHOOLS PROVIDED BY THE STATE

Data for school year 19...-

State.....

Item	Amount	Percent
1	2	3
I. State school funds by source:		
A. Appropriations from State general funds ¹		
B. State taxes levied wholly or in part for the schools, the proceeds of which do not become a part of State general funds:		
1. General property.....		
2. Income (personal or corporate, or both).....		
3. Motor fuel.....		
4. Severance (taxes on natural productions).....		
5. Sales:		
(1) General.....		
(2) Special:		
(1) Tobacco.....		
(2) Other (specify).....		
6. Other school taxes (specify).....		
C. Permanent school fund.....		
Total from State sources ¹		
II. State school funds by method of apportionment:		
A. General aid:		
1. Scholastic ²		
2. Teacher unit ²		
3. Other (specify).....		
4.....		
5.....		
B. Equalization aid ³		
C. Special aid ⁴ :		
1. Vocational education.....		
2. Transportation.....		
3. Other (specify).....		
4.....		
5.....		
Total from State sources ¹		

¹ Percent of total from State sources.
² Include legislative appropriations for the public schools from State general funds. Do not include in this item proceeds from any State tax levied wholly or in part for the schools.
³ Totals for items I and II should be the same.
⁴ Indicate whether on census, enrollment, average daily attendance, or other basis.
⁵ Include as "equalization aid" monies the State apportions to any school administrative unit in relation to ability of the unit to support a foundation education program.
⁶ Include as "special aid" monies the State apportions to any school administrative unit for a specific purpose.

FORM 16.—FINANCIAL RECEIPTS FOR SCHOOL SUPPORT

County..... State..... Data for school year 19.....

Name and number of administrative unit	Receipts from State sources ¹										Total revenue receipts (cols. 2, 14, and 20)	Grand total (cols. 25 and 26)			
	Elementary schools					High schools									
	Receipts from Federal sources	On total teacher units	On average daily attendance		On excess cost for physically handicapped children	To unapportioned county school fund (S. C. 4,161, 1935)	On years maintained	On average daily attendance		On excess cost for physically handicapped children			To unapportioned county high school fund (S. C. 4,221, 1935)	Total (cols. 3-13)	
1	3	3	4	5	6	7	8	9	10	11	12	13	14	26	27

Name and number of administrative unit	Receipts from local sources ²										Total (cols. 15-19)	
	Revenue receipts					Nonrevenue receipts						
	County monies		District monies ³		All other revenue receipts	Bond sales		Short-term loans	Sale of property	All other nonrevenue receipts		Total (cols. 21-24)
1	15	16	17	18	19	20	21	22	23	24	25	25

¹ Receipts from State sources should be reported in accordance with the methods and/or bases of distributing such monies to the local school units.
² Receipts from local sources should be in the form of actual collections or accruals rather than levies.
³ Include township, district, and municipal monies.



FORM 17.—SCHOOL EXPENDITURES BY ADMINISTRATIVE UNITS

County..... State..... Data for school year 19.....

Current expense

Name and number of administrative unit 1	Administration											Instruction					Operation of plant			
	Salaries			Supplies and other expenses		Total	Salaries			Text books	Teaching supplies	Other supplies and other expenses 1	Total	Salaries of janitors, engineers, etc.	Fuel	Water, light, and power	Supplies	Other expenses	Total	
	Board of education 1	Administrative	Clerical assistants	Administrative	Clerical assistants		Teachers	Instructional staff	Clerical assistants											Principals
	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
1																				

Current expense—Continued

Name and number of administrative unit 1	Auxiliary agencies and coordinate activities											Fixed charges			Summary of current expense																									
	Public libraries under board of education		Health service		Transportation 1		Attendance enforcement		Other			Rent	Total	Total salaries	Total other current expense	Grand total																								
	Salaries	Supplies and other expenses	Salaries	Supplies and other expenses	Salaries	Supplies and other expenses	Salaries	Supplies and other expenses	Salaries	Supplies and other expenses	Insurance funds						Total																							
	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43																			
1																																								

Name and number of administrative unit ¹	Capital outlay						Debt service						Total ¹³						
	Sites	New build-ings ²	Addi-tions to build-ings ³	Alter-ation of build-ings ⁷	Equipment (not replace-ments) ⁴		Total	Redemp-tion of short-term loans ¹¹	Pay-ments of warrants or bills of pre-ceding year	Redemption of school bonds		Inter-est on short-term and cur-rent loans		Interest on bonds		Re-funds (for other years)			
					Library books ⁵	Furni-ture, lab-oratory equip-ment, and fix-tures ¹⁰				Buses and other transpor-tation ¹¹	Pay-ments from current funds to retire bonds			Pay-ments from issue of new bonds to retire old bonds	Pay-ments from current funds		Pay-ments from sinking funds		
1	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62

¹ See Statistical Circular No. 10 (revised March 1938), Office of Education.

² Include per diem.

³ Exclude library books.

⁴ Exclude capital outlay and administration expense.

⁵ Include construction and all other costs of new buildings: Architectural service, legal service, travel expense, painting and decorating interior and exterior, etc.

⁶ Include costs of extensions of plant such as adding a story or wing to a building. Exclude the cost of constructing an entirely new building.

⁷ Include expenditures for changes, not repairs, which make possible new or improved services such as changing the type of heating system, installing electric lights, remodeling an elemen-tary school building for junior high school use, changing a classroom to a home-economics or other special room, etc.

⁸ Exclude costs of any supplies.

⁹ Exclude replacement costs.

¹⁰ Include expenditures for tables, chairs, dishes, compartment filing cases, bookcases, stands, racks, lockers, typewriters, and other labor-saving devices, electrical devices, etc.; chemical, biological, and other scientific laboratory equipment and demonstrative apparatus; machinery, tools, and other equipment for industrial education; all equipment for fine arts, homemaking, play-grounds; etc. Exclude replacement costs.

¹¹ Include all expenditures for purchase of vehicles and transportation equipment. Exclude cost of tires, batteries, etc., and replacements.

¹² Exclude money borrowed and paid back during same fiscal year.

¹³ Columns 52 through 61, excluding columns 55, 56, and 60.

FORM 18.—CHECK LIST FOR ADEQUACY OF SCHOOL BUILDINGS, GROUNDS, AND EQUIPMENT

Data for school year 19...-

Various approaches and emphases are possible in studying school building adequacy and utilization. Form 18 may be modified to include fewer items or expanded to include more detail. Use a separate form for each building.

It is advisable for instance to have prepared for each building sketches to show the size of site, location of the building or buildings, gardens, athletic fields, wells, streets, etc., and dimensions and characteristics of individual rooms in order that these sketches may be used by the local superintendent's office to prepare plans to scale.

An inventory card for each building on which data are recorded periodically may be prepared and filed in the office of the local superintendent.

A. LOCATION AND UTILIZATION.

1. Name and number of school
2. Building is located ¹ in the $\frac{1}{4}$ of the $\frac{1}{4}$ of Sec., Twp.
Range
3. Administrative unit name and number County
..... State
4. Encircle grades provided: K 1 2 3 4 5 6 7 8 9 10 11 12 13 14

Elemen-	Junior	Senior	Total
tary ²	high school ²	high school ²	
5. Total enrollment (exclude duplicates)
6. Average daily attendance
7. Membership as of (.....)
8. Number of teachers
9. Number of pupils housed in temporary quarters
10. Number of seats or pupil-stations vacant one or more periods during typical day (sum of seats vacant during first period, second period, etc.)
11. Number of periods classrooms are not used during typical day (sum of classrooms vacant first period, second period, etc.)

Items involving judgment

12. Building is at present (check): Crowded or congested; used nearly to capacity; large enough to house more pupils
13. Classrooms or part of building most congested (check): Elementary; junior high school; senior high school

¹ If land in the State is located by metes and bounds, this item will need to be changed accordingly.
² Report by levels.—elementary school, junior high school, and senior high school, or in accordance with existing organization in State.

FORM 18.—CHECK LIST FOR ADEQUACY OF SCHOOL BUILDINGS, GROUNDS, AND EQUIPMENT—Continued

B. SCHOOL SITES.

1. Owned by (check): Board of education; other (specify)
2. Status of ownership (check): Deed in fee simple; conditional deed; leased; otherwise (specify)
3. Size of site to nearest half acre acres.
4. Portion now usable for playground (to nearest half acre) acres.
5. Improvements on site (check): Walks to main entrance; lawns; landscape planting; drainage (tile, etc.); equipment for playgrounds

Items involving judgment

- | | <i>Satis-
factory</i> | <i>Unsatis-
factory</i> | <i>If unsatisfactory,
give reasons</i> |
|---|---------------------------|-----------------------------|--|
| 6. Size of site | | | |
| 7. Contour of site | | | |
| 8. Size of playground space | | | |
| 9. Surface of playground space | | | |
| 10. Drainage | | | |
| 11. Walks | | | |
| 12. Lawns | | | |
| 13. Landscape planting | | | |
| 14. General surroundings | | | |
| | <i>Yes</i> | <i>No</i> | <i>Remarks</i> |
| 15. Should site be enlarged? | | | |
| 16. Can site be readily enlarged? | | | |
| 17. Should grounds be leveled or filled in? | | | |
| 18. Can they easily be leveled or filled in? | | | |
| 19. If site should be enlarged, how many acres should be added? acres;
approximate cost \$ | | | |
| 20. If site should be leveled or filled in, give approximate cost of work \$ | | | |

C. THE SCHOOL BUILDING.

1. Owned by (check): Board of education; other (specify)
2. Age:
 - (a) Give date of construction; date of additions
 - (b) (Check): Under 5 years old; 5-14 years; 15-24 years; over 25 years
3. Stories: Number of stories above basement stories.
4. Basement: Is there a basement?; is it a full basement?
5. Exterior walls are (check): Concrete; stone; brick; blocks (tile or concrete); frame (plain); frame (stucco or veneer)
6. Roof: Wood shingles; composition; clay tile; slate; metal; other (specify)
7. Painting: Is building painted outside?; inside?
8. Corridors:
 - (a) Width of main corridors ft.; secondary corridors ft.
 - (b) Construction (check): Concrete or steel; part steel or concrete and part wood; wood

FORM 18.—CHECK LIST FOR ADEQUACY OF SCHOOL BUILDINGS, GROUNDS, AND EQUIPMENT—Continued

C. THE SCHOOL BUILDING—Continued.

9. Stairways:

- (a) Number to second floor; width; number to third floor; width
- (b) Construction (check): Concrete or steel; part steel or concrete and part wood; wood

Items involving judgment

	<i>Satisfactory</i>	<i>Needs re- pairs or re- placements</i>	<i>Approximate cost of re- pairs or re- placements</i>
10. Foundation			
11. Exterior walls			
12. Interior walls			
13. Roof			
14. Doors and windows			
15. Exterior paint			
16. Interior paint			
17. Floors			
18. Stairways			
19. Plaster			
20. Other (specify)			

D. GENERAL SERVICE SYSTEMS.

1. Heating:

- (a) Kind (check): Steam; hot water; warm air; electric units; vented gas radiators; unvented radiators; jacketed heaters (give No.)
- (b) Is automatic temperature control installed?
- (c) Kind of fuel used

2. Fire protection system:

Is school equipped with:

		(Check) <i>Yes No</i>			(Check) <i>Yes No</i>
(a) Fire-proof boiler room?			(h) Automatic fire alarm		
(b) Fire-resistive stairs?			system?		
(c) Fire-resistive corridors?			(i) Direct fire call?		
(d) Fire escapes?			(j) Automatic sprinkling sys-		
(e) Stand pipes and hose reels?			tem (in hazardous		
(f) Exit lights and signs?			rooms)?		
(g) Chemical fire extin-			(k) Fire doors and partitions?		
guishers?					
Number					

3. Cleaning system:

- (a) Kind of equipment (check): Vacuum cleaners, electric; hand
- (b) Are wood floors waxed?; oiled?
- (c) Janitor service: Hired adults, full-time; part-time; hired pupils; teachers

4. Artificial lighting:

- (a) Kind (check): None; oil lamps; gas lamps; gas; electricity

FORM 18.—CHECK LIST FOR ADEQUACY OF SCHOOL BUILDINGS, GROUNDS, AND EQUIPMENT—Continued

D. GENERAL SERVICE SYSTEMS—Continued.

4. Artificial lighting—Continued.

- (b) Location of lights (checks): Auditorium; halls; toilets; classrooms
- (c) Source of electric current: From school plant; from community system

5. Special equipment:

- (a) Is there a school clock?; is it electrically regulated?
- (b) Is there a clock in each classroom?
- (c) Check kind of signal system: Hand bell; large bell; electric bell operated by hand; by the clock
- (d) Is there a telephone in principal's office?; in each classroom?; in special room?
- (e) Is there a first-aid cabinet: In principal's office?; in each classroom?

6. Facilities for drinking, washing, and bathing:

- (a) Type of lavatories: Give number of basins or bowls with running water; without running water
- (b) Type of drinking water facilities: Bubble fountains (give number on grounds; in building); individual cups; common cups; other (specify); none
- (c) Source of drinking water: Public or community system; school artesian well; school driven or bored well; dug well; spring
- (d) Method of securing water: Power-operated pump and pressure tank; force pump; ordinary pump; windlass and bucket; hand-over-hand pump; carried from off site (if so, how far?
- (e) Bathing facilities: Number of showers for boys; for girls
- (f) Hot and cold water: Hot water for washing; for showers; cold water for washing; for showers
- (g) Janitors' slop sinks: In separate closets or inclosures; in main toilets

7. Toilets and urinals:

- (a) Type of toilet: Water flush; chemical; outdoor privy with pit; without pit
- (b) Number of seats for boys; for girls
- (c) Type of urinals: Individual stalls; give number; troughs; give number of lineal feet; outdoors

Items involving judgment

	<i>List repairs needed</i>	<i>List other respects in which inadequate</i>
8. Heating
9. Fire protection
10. Cleaning system
11. Artificial lighting
12. Other special equipment
13. Water supply
14. Toilets
15. Other (specify)

FORM 18.—CHECK LIST FOR ADEQUACY OF SCHOOL BUILDINGS, GROUNDS, AND EQUIPMENT—Continued

E. THE CLASSROOMS.

- 1. Number of regular classrooms: In the basement; on the first floor on the second floor; on the third floor; total
- 2. Number of classrooms not in use; why not?
- 3. Are classroom walls plastered?; painted?; what color?
- 4. Are ceilings plastered?; painted?; what color?

Information for each classroom:

- | | Room number | | | | | | | | | |
|---|-------------|---|---|---|---|---|---|---|---|----|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 5. Grade | | | | | | | | | | |
| 6. Pupil enrollment | | | | | | | | | | |
| 7. Area of classroom (sq. ft.) | | | | | | | | | | |
| 8. Area window space (sq. ft.) | | | | | | | | | | |
| 9. Percent window space (item 8) is of floor space (item 7) | | | | | | | | | | |
| 10. Number of windows: | | | | | | | | | | |
| (a) Front of room | | | | | | | | | | |
| (b) Left of room | | | | | | | | | | |
| (c) Right of room | | | | | | | | | | |
| (d) Rear of room | | | | | | | | | | |
| 11. Number of single patent desks | | | | | | | | | | |
| 12. Number of double patent desks | | | | | | | | | | |
| 13. Number of benches or other desks | | | | | | | | | | |
| 14. Number of electric outlets | | | | | | | | | | |
| 15. Is there a teacher's desk? | | | | | | | | | | |
| 16. Are there window shades? | | | | | | | | | | |
| 17. Is there a thermometer? | | | | | | | | | | |
| 18. Is there a cloakroom? | | | | | | | | | | |

Items involving judgment

- | | Room number | | | | | | | | | |
|---|-------------|---|---|---|---|---|---|---|---|----|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 19. Paint: | | | | | | | | | | |
| (a) Not painted | | | | | | | | | | |
| (b) Wrong color | | | | | | | | | | |
| (c) Needs renewing | | | | | | | | | | |
| 20. Doors need repairs | | | | | | | | | | |
| 21. Windows should be rearranged | | | | | | | | | | |
| 22. Closets or bookshelves needed | | | | | | | | | | |
| 23. Artificial lighting needs attention | | | | | | | | | | |
| 24. Heating needs attention | | | | | | | | | | |
| 25. Blackboards: | | | | | | | | | | |
| (a) Should be replaced | | | | | | | | | | |
| (b) More needed | | | | | | | | | | |
| 26. Pupils' desks need attention | | | | | | | | | | |
| 27. Shades in poor condition or of wrong kind | | | | | | | | | | |
| 28. Room poorly equipped | | | | | | | | | | |
| 29. Number of desks not adequate | | | | | | | | | | |

FORM 18.—CHECK LIST FOR ADEQUACY OF SCHOOL BUILDINGS, GROUNDS, AND EQUIPMENT—Continued

F. SPECIAL ROOMS.

	Give number		Floor area sq. ft.	Pupil stations ¹
	In use	Not in use		
1. Play rooms				
2. Auditoriums				
3. School libraries in building				
(a) Give total number of volumes				
4. Rooms in building for:				
(a) Industrial arts or manual training				
(b) Home economics				
5. Rooms in another building for:				
(a) Industrial arts or manual training				
(b) Home economics				
6. Cafeterias				
7. Principal's office				
8. Rooms for janitor's supplies				
9. Others (specify)				

Items involving judgment

10. Auditorium:
 - (a) Is it adequate? Yes; no; If not, why not?
 - (b) Is it satisfactorily equipped? Yes; no
11. List below other special rooms that are inadequate and explain inadequacies:
12. If any special rooms are not in use, list rooms and explain:

G. SUMMARY AND RECOMMENDATIONS CONCERNING BUILDING AND SITE.

Items involving judgment

- | | (Check) | Give reason |
|--|---------|-------------|
| 1. Recommendation concerning building: | | |
| (a) Should be abandoned | | |
| (b) Might be retained temporarily | | |
| (c) Suitable for permanent retention
(10 years or more) | | |
| 2. Recommendation concerning site: | | |
| (a) Should be abandoned | | |
| (b) Might be made suitable for retention | | |
| (c) Satisfactory for continued use and
improvement | | |

3. Further recommendations or remarks:
 Prepared by (or under supervision of)
(Name) (Title)

Date

¹ Such as seats, place at laboratory tables, etc.

LOCAL SCHOOL UNITS

FORM 19.—NUMBER AND PERCENTAGE OF PUPILS ENROLLED ACCORDING TO NUMBER OF TEACHERS.

Data for school year 19...-

County State

Size of school	Number of pupils	Percentage of pupils ¹	Number of schools	Average number of pupils per teacher ²
1	2	3	4	5
1-teacher.....				
2-teacher.....				
3-teacher.....				
4-teacher.....				
5-teacher.....				
6-teacher.....				
7-teacher.....				
8-teacher.....				
9-teacher.....				
10-teacher.....				
Over 10-teacher.....				
Total.....				

¹ Divide the total number of pupils in all schools (total of column 2) into the number of pupils in a given group.
² Divide the number of pupils (column 2) by the number of teachers in a given group of schools.

FORM 20.—NUMBER AND PERCENTAGE OF SCHOOLS,¹ TEACHERS, AND PUPILS ENROLLED ACCORDING TO LENGTH OF TERM

Data for school year 19...-

County State

Length of term	Schools		Teachers		Pupils	
	Number	Percent	Number	Percent	Number	Percent
1	2	3	4	5	6	7
3 months.....						
4 months.....						
5 months.....						
6 months.....						
7 months.....						
8 months.....						
9 months.....						
10 months.....						
Total.....		100.0		100.0		100.0

¹ A separate form may be used for 1-, 2-, and 3-teacher schools, respectively.

FORM 21.—GRADE DISTRIBUTION OF PUPILS BY NUMBER AND PERCENTAGE ARRANGED BY SCHOOLS HAVING INDICATED NUMBER OF TEACHERS

Data for school year 19.....

County State

Grade 1	Pupils enrolled (or in membership) in											
	1-teacher schools		2-teacher schools		3, 4, and 5-teacher schools		6- to 9-teacher schools		10-or-more teacher schools		All schools	
	Number	Percent- age of total s	Number	Percent- age of total s	Number	Percent- age of total s	Number	Percent- age of total s	Number	Percent- age of total s	Number	Percent- age of total s
1	2	3	4	5	6	7	8	9	10	11	12	13
2												
3												
4												
5												
6												
Total elementary 1												
7												
8												
9												
Total junior high 1												
10												
11												
12												
Total senior high 1												
Grand total		100.0		100.0		100.0		100.0		100.0		100.0

1 Report by levels—elementary school, junior high school, and senior high school, or in accordance with existing organization in the State.
 2 Use one cross out "enrollment" or "membership."
 3 Divide the individual grade distribution reported in preceding column by the grand total for that column.

LOCAL SCHOOL UNITS

FORM 22.—DATA RELATING TO TEACHING PERSONNEL: CLASSROOM TEACHERS IN SCHOOLS AND ADMINISTRATIVE UNITS

Data for school year 19...

County State

Administrative unit and school ¹		Kind of school ²				Training ³					
Name	Number	Elementary	Junior high school	Senior high school	High school only	College					
						1-year	2-years	3-years	Bachelor's degree	Master's degree	Ph.D. or higher degree
1	2	3	4	5	6	7	8	9	10	11	12

Administrative unit and school	Years of experience ⁴								Years of tenure ⁵								Average annual salary	Cost of living index
	1	2	3	4	5	6-10	11-20	21 or more	1	2	3	4	5	6-10	11-20	21 or more		
1	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30

¹ This form may be used as a summary for administrative and supervisory officers. If items of information are not available for the individual teacher, a form for collecting these items may be needed.
² Record totals for the several schools on the line carrying the name and number of the administrative unit and the distribution of teachers for each school on a separate line.
³ Report by levels—elementary school, junior high school, and senior high school, or in accordance with existing organization in State.
⁴ Record highest training only of each individual.
⁵ Include present year.
⁶ Number of years in present position; include present year.
⁷ To be reported in accordance with kinds of certificates authorized; supply appropriate columns therefor.

FORM 23.—TAX RATES FOR SCHOOL SUPPORT

Data for school year 19...

County State

Total rate in cents per \$100 valuation ¹	Number of districts voting each levy	Number of scholastics ² in district voting each levy	Assessed valuation of property covered by each levy	Percentage of property covered by each levy
1	2	3	4	5

¹ In intervals of 5.
² Includes all pupils within the school census ages.

FORM 24.—AMOUNT OF ASSESSED VALUATION PER SCHOLASTIC

Data for school year 19...-

County State

Assessed valuation per scholastic 1	Number of scholastics	Percentage of scholastics	Number of administrative units
2	3	4	5

In intervals of \$500, or multiples thereof.

FORM 25.—NUMBER AND PERCENTAGE OF SCHOOLS, TEACHERS, AND PUPILS, ACCORDING TO ANNUAL INSTRUCTIONAL COST PER PUPIL IN AVERAGE DAILY ATTENDANCE

Data for school year 19...-

County State

Annual cost per pupil in average daily attendance	Schools		Teachers		Pupils in average daily attendance	
	Number	Percent	Number	Percent	Number	Percent
1	2	3	4	5	6	7
Less than \$10.						
\$10-\$19						
Etc.						

FORM 26.—NUMBER AND PERCENTAGE OF SCHOOLS, TEACHERS, AND PUPILS, ACCORDING TO INSTRUCTIONAL COST PER MONTH PER PUPIL IN AVERAGE DAILY ATTENDANCE

Data for school year 19...-

County State

Cost per month per pupil in average daily attendance	Schools		Teachers		Pupils in average daily attendance	
	Number	Percent	Number	Percent	Number	Percent
1	2	3	4	5	6	7
Less than \$1						
\$1-\$1.99						
Etc.						

FORM 27.—SOCIOLOGICAL AND ECONOMIC FACTORS: AREA AND POPULATION, 1930¹

State (All States or selected ones may be listed)	Population					Percentage distributions of population							Total area in square miles	Census 1930 and estimate for 19—	Per-centage increase 1930 over 1920	Per-centage of total population	Density per square mile	Native white			Foreign born or mixed-age	Total foreign-born white	Total white	Negro	Indian	Mexican	By residence																																																								
	Total	Native parent-age	Foreign or mixed-age	Urban	Village	Total	Native parent-age	Foreign or mixed-age	Total	Negro	Indian	Mexican						On farm	Rural																																																																
																				Percentage of illiterates							Native white	Foreign-born white	7-13 years	14-15 years	16-17 years	18-20 years																																																			
1	18	10	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100

¹ Data from: United States, Department of Commerce, Bureau of the Census, Fifteenth census of the United States, 1930. Washington, United States Government printing office, 1931. Bureau of Foreign and Domestic Commerce. Statistical abstract of the United States, 1935. Washington, United States Government printing office, 1935. Estimates from Bureau of the Census. Dawson, Howard A. Equalization of educational opportunity through the Harrison-Fletcher Bill, Washington, National education association, 1935. 5 p. Mimeog.



FOR 9.—DATA REFLECTING ECONOMIC ABILITY AND EFFORT TO PROVIDE EDUCATIONAL OPPORTUNITY.¹

State (All States or selected ones may be listed)	Economic ability										Effort					
	Taxpaying ability per capita ²	Rank ³	Wealth per capita ⁴	Rank ⁵	Income per capita ⁶	Rank ⁷	Retail sales per capita ⁸	Rank ⁹	Percent of taxpaying ability required for schools ⁷	Rank ¹¹	Current expenditures for schools per pupil enrolled ⁹	Rank ¹⁰	Value of school property per pupil enrolled ¹¹	Rank ¹²	Average salary per teacher, principal, and supervisor ¹³	Rank ¹⁴
1	2	3	4	5	6	7	8	9	10		12	15	16	17	18	19

¹ Adapted from Exhibits A and B in statement of Hon. Pat Harrison (Miss.) on equal opportunity for children. In Congressional Record, June 20, 1936; also reprinted privately. Unless otherwise indicated, rankings are from this source.

² Data derived from Chism, Leslie L. The Economic ability of the States to finance public schools. New York, Teachers college. Columbia university, 1936. p. 124, table 27, col. 2, (Contributions to education, no. 669) and population estimates of Bureau of the Census.

³ Rank among the 48 States on item in preceding column; largest is assigned rank 1.

⁴ National Industrial Conference Board, Bulletin May 20, 1933. The national total is distributed among the States on the basis of the percent of 1930. National wealth allotted to each State in table 4, p. 96, of the Conference Board Bulletin, February 20, 1932. Per capita figures are derived by use of total population figures reported by the Bureau of the Census.

⁵ Sales management, April 20, 1934.

⁶ Bureau of the Census, 1933.

⁷ Aahby, Lyle W. The efforts of the States to support education. Research bulletin (N. E. A.), 14:150, May 1936.

⁸ Rank among the 48 States on item in preceding column; smallest is assigned rank 1.

⁹ United States Department of the Interior, Office of Education, Statistics of State school systems. Washington, United States Government printing office, 1934, table 28, p. 91. (Office of education, Bulletin, 1933, no. 2.)

¹⁰ Aahby. Op. cit., table 8, col. 8, p. 123, and table 12, col. 8, p. 128. Office of Education. Op. cit., table 15, p. 71.

¹¹ Office of Education. Op. cit., table 18, pp. 74-75.



LOCAL SCHOOL UNITS

FORM 29.—AMOUNT AND VALUE OF AGRICULTURAL PRODUCTS

Data for 19...

County State

Product	County production	Percent of State	County value in dollars	Percent of State
1	2	3	4	5
.....
.....

FORM 30.—FARMS AND FARM TENANCY IN (COUNTY) AND ADJACENT COUNTIES AND THE STATE ¹

County	Total farms operated					Farms operated by tenants				
	Number in—			Percent of change		Number in—			Percent of change	
	1925	1930	1935	1925 to 1930	1930 to 1935	1925	1930	1935	1925 to 1930	1930 to 1935
1	2	3	4	5	6	7	8	9	10	11
.....
.....

¹ Data from United States Department of commerce. Bureau of the census. Census of Agriculture (1935, etc.), vol. I. Washington, United States Government printing office.

FORM 31.—NUMBER AND PERCENT OF TOTAL EMPLOYED BY INDUSTRIES

Data for 19...

County State

Industry ¹	Gainfully employed	
	Number	Percent of total
1	2	3
Total.....
Agriculture.....
Forestry and fishing.....
Extraction of minerals.....
Manufacturing and mechanical industries.....
Transportation and communication.....
Trade.....
Public service.....
Professional service.....
Domestic and personal service.....
Clerical occupations.....
Others (specify).....
.....
.....

¹ This list is suggestive. A fuller classification and data by sex and counties are given in the Fifteenth census of the United States. Washington, United States Government printing office, 1932. Population, vol. III, part 2, table 20.

FORM 32.—LEGAL NAME AND DEFINITION OF ADMINISTRATIVE UNITS AND FUNCTIONS OF BOARDS AND OFFICERS 1

State Data for school year 19

Legal name of administrative unit	Definition	Grades or schools legally authorized	Board, number of members, and executive officer	Responsibilities of educational and civil agents and agencies in connection with educational functions of administrative units							
				Certification and employment of teachers	Formulation of course of study	Adoption and selection of textbooks	Supervision of instruction	Preparation and approval of budget	Taxation	Depositing and disbursing funds	Preparation and submission of reports
1	2	3	4	5	6	7	8	9	10	11	12

1 To get a true picture of the relationships between units and the significance of any one unit, all units in the State should be considered. Unless otherwise indicated, "board" or "superintendent" referred to in columns 5 through 12 is that named in column 4.

FORM 33.—EDUCATIONAL DATA BY PROPOSED ATTENDANCE AREAS AND ADMINISTRATIVE UNITS

County State Data for school year 19

Proposed administrative units and attendance areas 1	Scholastic population ages			Enrollment 2	Average daily attendance 3	Number of classroom teachers 4		Current cost 5		Immediate building needs 6	
	6 to 11	12 to 14	15 to 17			Present	Estimated	Present	Estimated	Number of rooms	Estimated cost
1	2	3	4	5	6	7	8	9	10	11	12

1 On the first line write the name and/or number of a proposed administrative unit and record figures representing item summaries, if there are two or more attendance areas to be located in that unit. Immediately under the name of the administrative unit, write the names of the proposed attendance areas and record required data for each area. Proceed in similar manner for each administrative unit.

2 Report by levels—elementary school, junior high school, and senior high school, or in accordance with existing organization in the State.

3 Exclude capital outlay and debt service.

4 Indicate whether these needs are in the form of alterations, additions, or new buildings.



FORM 34.—CHECK LIST FOR RESPONSIBILITIES OF EDUCATIONAL AND CIVIL AGENTS AND AGENCIES IN CONNECTION WITH EDUCATIONAL FUNCTIONS OF ADMINISTRATIVE UNITS

Data for school year 19

Type of administrative unit

State

- I. Legal name of administrative unit:
- II. Definition of administrative unit:
- III. Grades or schools legally authorized:
- IV. Board, number of members, and executive officer:
- V. Functional responsibilities:

Functional responsibilities concerning	Vote of electorate	DISTRICT		Township board or trustees	County commission, or other civil board	COUNTY		STATE department of education	Other (specify)
		Superintendent (or principal)	Board of education			Superintendent	Board of education		
1. <i>County superintendent:</i> (a) Nominated by (b) Appointed by	2	3	4	5	6	7	8	9	10
2. <i>District superintendent (or principal-superintendent):</i> (a) Nominated by (b) Appointed by									
3. <i>Budget:</i> (a) Prepared by (b) Approved by (c) Executed by									
4. <i>Tax limits:</i> (a) Recommended by (b) Set by									
5. <i>Teachers:</i> (a) Hiring: (1) Nominated by (2) Appointed by (3) Assigned by (4) Supervised by									

<p>(b) Payment: (1) Payrolls prepared by..... (2) Checks drawn by.....</p> <p>(c) Dismissal: (1) Recommended by..... (2) Approved by.....</p> <p>6. Transportation: (a) Driver selected by..... (b) Routes planned by..... (c) Salaries fixed by.....</p> <p>7. Buildings and equipment: (a) Sites recommended by..... (b) Plans approved by..... (c) Purchase recommended by..... (d) Employees recommended by..... (e) State standards enforced by.....</p> <p>8. Programs of studies: (a) Recommended by..... (b) Approved by..... (c) State standards enforced by.....</p> <p>9. Textbooks: (a) Recommended by..... (b) Approved by..... (c) State adoptions enforced by.....</p> <p>10. Supplies: (a) Requisitioned by..... (b) Purchased by.....</p> <p>11. School funds: (a) Records kept by..... (b) Warrants drawn by..... (c) Expenditures recommended by.....</p> <p>12. Records (miscellaneous): (a) Records kept by.....</p> <p>13. Reports to State: (a) Made directly..... (b) Made through county unit.....</p> <p>14. District boundaries: (a) Changes recommended by..... (b) Changes approved by.....</p>			
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1. Fill in a separate check sheet for each type of administrative unit in the State unless there is no variation in the responsibilities of these units. In case there is no variation the names of all types of units may be listed on one sheet in the blank provided.

2. Indicate by checking in the proper square the responsibilities for each function listed below, modifying the form wherever necessary to show the true situation. The items checked in one column should represent the total picture of the functions of that particular agent or agency in respect to the particular type of administrative unit (for instance, the check marks in column 8 should indicate all responsibilities, duties, and powers of the county board of education in respect to the type of administrative unit named at the top of the check sheet). If all the responsibilities are not shown by the check marks, additional footnote explanations should be added.



FORM 35.—AVERAGE COST PER CLASSROOM FOR THE CONSTRUCTION OF SCHOOL BUILDINGS CLASSIFIED ACCORDING TO SIZE OF BUILDING, KIND OF SCHOOL, AND TYPE OF CONSTRUCTION

County State Data for 19.....

Cost per classroom unit by type of construction and kind of school

Size of school building	Type A						Type B			Type C			Type D			Type E		
	Junior high school		Senior high school		Elementary		Junior high school		Senior high school		Elementary		Junior high school		Senior high school		Elementary	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
1 room.....																		
2 to 4 classrooms.....																		
5 to 7 classrooms and auditorium and gymnasium.....																		
5 to 7 classrooms and combination auditorium-gymnasium.....																		
5 to 7 classrooms and auditorium only.....																		
8 to 12 classrooms and gymnasium.....																		
8 to 12 classrooms and combination auditorium-gymnasium.....																		
8 to 12 classrooms and auditorium only.....																		
12 to 20 classrooms and auditorium and gymnasium.....																		
12 to 20 classrooms and combination auditorium-gymnasium.....																		
12 to 20 classrooms and auditorium only.....																		
Over 20 classrooms and auditorium and gymnasium.....																		

1 Classification of American Institute of Architects.
 2 Report by levels—elementary school, junior high school, and senior high school, or in accordance with existing organization in State.



FORM 36.—IMMEDIATE AND FUTURE SCHOOL BUILDING NEEDS: NEW BUILDINGS, ADDITIONS, REMODELING, AND SITES
 County..... State..... Data for school year 19.....

Proposed administrative unit and attendance area ¹	Need (check one)		Number of teaching positions						Estimated cost of—						Notations on special features and on kind of addition or alteration							
	On present organization in present building ²			In present building ³			On proposed organization			In new construction ⁴			Total									
	Elementary	Junior high school	Senior high school	Elementary	Junior high school	Senior high school	Elementary	Junior high school	Senior high school	Elementary	Junior high school	Senior high school	Elementary	Junior high school		Senior high school	Site or addition to site	New building	Addition to building ⁵	Remodeling ⁶	Equipment	Total
1	4	5	6	8	9	10	11	12	13	14	15	20	21	22	23	24	25	26	27	28	29	30

¹ For each administrative unit proceed as follows: On the first line write the name and number of the proposed administrative unit and record figures representing item summaries if needs require more than one new building, addition, or alteration. On succeeding lines show for each proposed attendance area its immediate and future needs using a separate line for each item of need and check in column 2 or 3 whether it is an immediate or a future need in order to facilitate summarization of costs, etc., by immediate and future needs.

² Report by levels—elementary school, junior high school, and senior high school, or in accordance with existing organization in the State.

³ Use classification of American Institute of Architects.

⁴ Include costs of extensions of plant such as adding a story or wing to a building.

⁵ Include expenditures for changes, not repairs, which make possible new or improved services, such as changing the type of heating system, installing electric lights, remodeling an elementary school building for junior high school use, changing a classroom to a home-economics or other special room, etc.



LOCAL SCHOOL UNITS

FORM 37.—CURRENT COSTS BASED ON PRESENT SCHOOL ORGANIZATION AND ESTIMATED CURRENT COSTS BASED ON PROPOSED ORGANIZATION WITH PRESENT SALARIES AND SERVICES

Data for school year 19...-

County State

Proposed administration unit	Present current cost	Estimated cost of proposed organization based on present salaries and services	Increase or decrease (col. 2 minus col. 3)
1	2	3	4
State total			

FORM 38.—ABILITY TO FINANCE THE PROPOSED SCHOOL BUILDING PROGRAM

Data for school year 19...-

County State

Proposed administrative unit	Assessed valuation	Tax rate for debt service	Estimated income for debt service (legal debt)	Indebtedness			Surplus or deficit
				Present (existing)	Additional required	Total (cols. 5 and 6)	
1	2	3	4	5	6	7	

FORM 39 — SIZE OF SCHOOLS FIVE YEARS HENCE AS SHOWN BY ESTIMATED ENROLLMENTS AND ESTIMATED NUMBER OF TEACHERS

Based on data for school year 19...-

County State

Proposed administrative units and attendance areas	Estimated enrollment by groups—grades ¹				Estimated number of teachers needed			
	1-6	7-9	10-12	Total	Elementary	Junior high school	Senior high school	Total
1	2	3	4	5	6	7	8	9

¹ Report by levels—elementary, junior high school, and senior high school, or in accordance with existing organization in the State.

FORM 40 — ABILITY TO FINANCE THE EDUCATIONAL PROGRAM IN PROPOSED ADMINISTRATIVE UNITS¹

Data for school year 19

County State

Proposed administrative units	Assessed valuations	Tax rates	Estimated income by sources				Estimated annual expenditures ²			Estimated surplus or deficit (col. 7 minus col. 10, or col. 10 minus col. 7)
			Local (col. 2 times col. 3)	State	Federal	Total (cols. 4-6)	Current expenses excluding transportation	Transportation	Total (cols. 8 and 9)	
1	2	3	4	5	6	7	8	9	10	11

² Excluding capital outlay and debt service

FORM 41 — BUDGET FOR PROPOSED REORGANIZED SCHOOL SYSTEM

Name and number of proposed administrative unit

County State

A. RECEIPTS AND BALANCES.¹

Receipts by origin and method of production ¹	Amount received, 19.....	Estimated receipts, 19.....
1	2	3
1. REVENUE RECEIPTS:²		
(a) Federal:		
(1) Vocational education		
(2) Other ³		
(b) State		
(c) County		
(d) Local (township, district, municipal)		
(e) Philanthropic (educational foundations)		
(f) Other ⁴		
Total		
2. NONREVENUE RECEIPTS:		
(a) Loans and bond sales ⁵		
(b) Sales of property and insurance adjustments		
(c) Other		
Total		
3. Balances from previous year		
TOTAL AMOUNT AVAILABLE (ITEMS 1-3)		
4. Transfers from other administrative units		

¹ Include all receipts from public moneys from which school expenditures are made whether specifically designated as school funds or as general State, county, city, or other local funds. Exclude funds for school purposes handled by individual schools (not units) or by other agencies.

² Exclude funds received as endowments. (a) Specific items for revenue receipts may be inserted under the general items listed.

³ Report revenue receipts for item 1 (a, b, c, d) as Federal, State, county, or local, depending upon which of these political subdivisions DISTRIBUTED the moneys and whether these moneys were distributed in like amounts as collected or in amounts different from those collected: Moneys collected and distributed in LIKE amounts are to be reported opposite the line item indicating the political subdivision from which such revenue receipts were collected; moneys collected and distributed in DIFFERENT amounts are to be reported opposite the line item indicating the political subdivision which distributed such revenue receipts.

⁴ Include moneys paid by the Federal Government for educating Indians in local public schools, moneys derived from Federal forest reserve and Federal oil royalties, and Federal emergency funds for education.

⁵ Include fines, gifts, interest on bank deposits, temporary rents, tuition paid by patrons.

⁶ Exclude money borrowed and paid back during the same fiscal year.

FORM 41.—BUDGET FOR PROPOSED REORGANIZED SCHOOL SYSTEM—Continued

B. CURRENT EXPENSE.

Account 1	Amount authorized \$	Amounts expended 19...			Unexpended balance (close of year) \$	Estimated budget 19...	Change from column 2						
		Cash payments \$	Out-standing warrants \$	Total			Increase		Decrease				
							Amount	Percent	Amount	Percent			
1. Administration (general control):													
(a) Salaries:													
(1) Board of education													
(2) Administrative													
(3) Clerical assistants													
(b) Supplies and other expenses													
Total		8	4	6	6	7	8	8	10	11			
2. Instruction:													
(a) Salaries:													
(1) Supervisors													
(2) Principals													
(3) Instructional staff:													
(a) Teachers													
(b) Other instructional staff													
(4) Clerical assistants													
(b) Textbooks													
(c) Teaching supplies													
(d) Other supplies													
(e) Other expenses													
Total													
3. Operation of plant:													
(a) Salaries of janitors, engineers, etc.													
(b) Fuel													
(c) Water, light, and power													
(d) Supplies													
(e) Other expenses													
Total													

4. Maintenance of plant:

- (a) Salaries.....
- (b) Supplies and other expenses.....
- Total.....

5. Auxiliary agencies and coordinate activities:

(a) Public libraries under board of education:

- (1) Salaries.....
- (2) Supplies and other expenses.....

(b) Health service:

- (1) Salaries.....
- (2) Supplies and other expenses.....

(c) Transportation:

- (1) Salaries.....
- (2) Supplies and other expenses.....

(d) Attendance enforcement:

- (1) Salaries.....
- (2) Supplies and other expenses.....

(e) Other:

- (1) Salaries.....
- (2) Supplies and other expenses.....
- Total.....

6. Fixed charges:

- (a) Insurance.....
- (b) Retirement funds.....
- (c) Rent.....
- (d) Other.....
- Total.....

Summary of current expense:

- Total salaries.....
- Total other current expense.....
- Grand total.....

1 See Statistical Circular No. 10 (revised March 1938), Office of Education.

2 To be compiled from the budgets and accounts of districts forming the proposed administrative unit.

3 For the proposed administrative unit.

4 Include per diem.

5 Instructional salaries may be reported by levels, as elementary school, junior high school, and senior high school, or in accordance with existing organization in the State.

6 Exclude library books.

7 Exclude capital outlay and administration expense.

FORM 41.—BUDGET FOR PROPOSED REORGANIZED SCHOOL SYSTEM—Continued
 C. CAPITAL OUTLAY AND DEBT SERVICE.

Account	Amount authorized	Amounts expended		Unexpended balance (close of year) ¹	Estimated budget 19	Change from column 2							
		Cash payments	Outstanding warrants			Total (columns 3 and 4)	Increase	Decrease	Amount	Percent			
1. Capital outlay:													
(a) Sites													
(b) New buildings													
(c) Additions to buildings													
(d) Alteration of buildings													
(e) Equipment (not replacements)													
(1) Library books													
(2) Furniture, laboratory equipment, and fixtures													
(3) Buses and other transportation													
Total													
2. Debt service:													
(a) Redemption of short-term loans													
(b) Payments of warrants or bills of preceding year													
(c) Redemption of school bonds:													
(1) Payments from current funds to retire bonds													
(2) Payments from sinking funds to retire bonds													
(3) Payments from issue of new bonds to retire bonds													
(d) Payments into school sinking funds													
(e) Interest on short-term and current loans													
(f) Interest on bonds:													
(1) Payments from current funds													
(2) Payments from sinking funds													
(3) Refunds (for other years)													
Total													

1 To be compiled from the budgets and accounts of districts forming the proposed administrative unit.
 2 For the proposed administrative unit.
 3 Include construction and all other costs of new buildings: Architectural service, legal service, travel expense, painting and decorating interior and exterior, etc.
 4 Include costs of extensions of plant such as adding a story or wing to a building. Exclude the cost of constructing an entirely new building.
 5 Include expenditures for changes, not repairs, which make possible new or improved services such as changing the type of heating system, installing electric lights, remodeling an elementary school building for junior high school use, changing a classroom to a home-economics or other special room, etc.
 6 Exclude costs of any supplies.
 7 Exclude replacement costs.
 8 Include expenditures for tables of all kinds, chairs, dishes, compartment filing cases, bookcases, stands, racks, lockers, typewriters and other labor-saving devices, electrical devices, etc. making, playgrounds, etc. Exclude replacement costs.
 9 Include all expenditures for purchase of vehicles and transportation equipment. Exclude cost of tires, batteries, etc., and replacements.
 10 Exclude money borrowed and paid back during same fiscal year.
 11 Exclude items 2c (2, 2c (3), and 2f (2)).



D. RECAPITULATION OF EXPENDITURES AND BALANCES

Account or expenditure	Amount authorized	Amounts expended 19...			Unexpended balance (close of year)	Estimated budget 19...	Change from column 2							
		Cash payments	Outstanding warrants	Total			Increase		Decrease					
							Amount	Percent	Amount	Percent				
1. Administration														
2. Instruction														
3. Operation														
4. Maintenance														
5. Auxiliary agencies														
6. Fixed charges														
7. Total current expense														
8. Capital outlay														
9. Debt service														
Total for all schools														
10. Balance carried to next year														
11. Transfers to other administrative units														

1 Report moneys on hand from: revenue receipts, nonrevenue receipts, and advancements (revising funds)
 2 Report school moneys paid by one local school unit to another for services rendered school residents of the paying district by schools of the receiving district. Although the main purpose of such transfers may be tuition payments (excluding tuition from parents), transfers may be made for other purposes. It is essential that transfers be recorded and reported separately.

FORM 41.—BUDGET FOR PROPOSED REORGANIZED SCHOOL SYSTEM—Continued.
E. SUMMARY OF ESTIMATED EXPENDITURES AND RECEIPTS, 19

- 1. Total estimated current expense.....
- 2. Total estimated revenue receipts for current expense (exclude revenue receipts for capital outlay, interest, and sinking fund).....
- 3. Estimated deficit for current expense (when item 1 exceeds item 2).....
- 4. Estimated surplus for current expense (when item 2 exceeds item 1).....
- 5. Total estimated payments for debt service.....
- 6. Total estimated receipts for interest and/or sinking fund, and/or bond retirement.....
- 7. Estimated deficit for debt service (when item 5 exceeds item 2).....
- 8. Estimated surplus for debt service (when item 6 exceeds item 2).....
- 9. Estimated payments for capital outlay.....
- 10. Estimated nonrevenue and other receipts available for capital outlay.....
- 11. Estimated deficit for capital outlay (when item 9 exceeds item 10).....
- 12. Estimated surplus for capital outlay (when item 10 exceeds item 9).....

¹ Based on proposed budget.

F. JUSTIFICATION (IT IS DESIRABLE TO APPEND SUPPORTING TEXTUAL AND STATISTICAL DATA HERE).