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Unification of the elementary school districts in the Lodi Union High School District

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UNIFICATION OF THE ELEMENTARY SCHOOL DISTRICTS IN THE
LODI UNION HIGH SCHOOL DISTRICT

A Thesis
Presented to
the Faculty of the School of Education
The College of Pacific

In Partial Fulfillment
of the Requirements for the Degree
Master of Science in Education

by
Newell Walter Johnson

June 1957

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CHAPTER I

INTRODUCTION

For many years the question of school district organization has been a serious one in California. In recent years the problem has been intensified, both as to its impact upon the education of children and as to the interest expressed in making whatever changes are desirable to improve the situation. For over forty years there has been serious concern expressed by those studying school administration in California as well as by the California Congress of Parents and Teachers, California Taxpayers Association, League of Women Voters, and the general public concerning school district organization as it still exists in many parts of our state.

School districts in the State of California developed essentially in the same way as such districts developed in other parts of the United States. Generally, each town or city became a district for a school system of its own in the early days. However, in areas in which towns or cities were not established schools were made available wherever a group of children lived who required the services of public education. In most cases the need for the establishment of a school was tantamount, also, to the need for the establishment of a school district.

The variation in the pattern of school districts in

California from that in most parts of the country occurred when secondary schools were established. In most states secondary schools were established and operated by some of the then established districts which were operating elementary schools, and as other areas desired to be served by the high school, the area would either join with the district operating the high school and become part of the same administrative unit or send their pupils to the high school on some sort of a tuition basis. In California, however, along with such states as Wisconsin, Illinois, and Kansas, the necessity for the establishment of public high schools brought about the organization of separate high school districts, so that in the early years of operation of secondary education in California all high schools were operated by districts separate and apart as administrative units from the district which was operating the elementary schools. The typical pattern was the establishment of a union or a city high school district which encompassed the area served by several elementary districts.

As a result the number of school districts in California continued to increase until the early 1920's at which time the state had in the neighborhood of 4,000 school districts. Just prior to this peak the movement of reorganization began to receive attention.

The attitude of the people in regard to reorganization

is interesting to note. Instead of much of the emotional, tradition-inspired arguments which prevailed a few years ago, there is evidence that logical and reasonable consideration of school district organization and its associated problems is being undertaken. Progress in this direction is one of the first changes needed before consideration can be given to the problem.

With this change of attitude has come an increased interest in the study of school district organization. This interest has resulted in many positive conclusions reached by educational study groups. For example, the California Association of School Administrators has taken a positive stand in requesting that legislation be enacted to require completion of the study of school district organization in the counties of the State, and for the county committees involved, as a result of state legislation, to make recommendations for the inclusion of all territory in the state in unified school districts. A somewhat similar position has been taken by the California Association of Secondary School Administrators.

I. STATEMENT OF PROBLEM

It is the purpose of this study:

1. To provide a description of the seventeen school dis-

tricts¹ within the boundaries of the Lodi Union High School District in the matters of:

A. Financial status

1. Assessed valuation per district.
2. Assessed valuation per A.D.A.
3. Expenditure costs per A.D.A.
4. Present tax rate.
5. Bonded indebtedness.

B. Enrollment

1. Past, present, and projected.
2. Multiple graded classrooms.

C. Educational services

D. Schoolhousing and facilities in present use.

E. Ecological factors

2. To examine these facts and conditions in view of the criteria of an adequate unified school district organization² in regard to:

- A. Financial structure
- B. Size of proposed district
- C. Educational services
- D. Ecological factors

¹The seventeen school districts are: Alpine-Victor, Bruella Un., Clements Un., Davis Elkhorn, Harmony Grove, Henderson, Houston, Lafayette, Live Oak, Lockeford, Lodi Un., Ray Un., Terminous, Tokey Colony, Turner, and Woods.

²California Administrative Code, Article 15,7, Subchapter 1 of Title 5, Secs. 135.1 to 135.4 (Sacramento: Documents Division, 1951).

3. Finally, to ascertain if unification of the seventeen elementary school districts will fulfill the objectives as adopted by the State Board of Education, which are as follows:

- A. To produce a more effectively coordinated program of education for all levels of the State's public school system through strong local school district organization, with single administrative control over all levels of public education in a given area.
- B. To provide a more efficient use of public funds, brought about by the creation of school districts capable of furnishing necessary educational services at a reasonable unit cost.
- C. To provide a better and more equalized educational opportunity for all children in the State through the creation of school districts sufficient in size to be able to provide curricular offerings and other services not possible under existing organization.
- D. To effect as great a degree of equalization of financial resources on the local level as circumstances will permit.³

II. JUSTIFICATION OF THE STUDY

Justification of this study can, perhaps, be best summed up in a recent policy adopted by the California State Board of Education:

³State Board of Education, "Policies of the State Board of Education Regarding School District Organization, California Schools, Volume XXIV, September, 1953.

It is the intent and expectation that the plan of school district organization for the State of California will provide for a series of well-organized unified districts. Furthermore, it is recognized that the district is the agency which should operate schools, and that whenever community needs can be met, a district should be of sufficient size, have an adequate tax base, and have a sufficient number of children to constitute a district which can be effectively and economically administered and be able to provide all the services required without undue dependence on other agencies.⁴

III. DELIMITATIONS

It is not the intent of this study to propose the organization of an educational program, nor propose fixed transportation routes, attendance centers, trustees areas nor suggest an absolute tax rate for additional services. Instead, these items will be recommended for future study.

IV. DEFINITION OF TERMS USED

In order to better understand the various terms used throughout this report, the following definitions are offered.

Administrative unit. An administrative unit may be defined as a geographic unit comprising all the area under a single system of school administration. The administrative unit usually constitutes a taxing or fiscal unit.⁵

⁴Statement of Policy on School District Organization by the California State Board of Education, adopted Jan. 4, 1956 (Sacramento: Calif. State Dept. of Education, Div. of Public School Administration).

⁵Dawson, Reeves, et al, Your School District (Washington, D.C.: National Education Association, 1948), p. 47.

Attendance area. The attendance area is the territory served by a particular school. One administrative unit may comprise several attendance areas. An attendance area does not necessarily have a separate system of administration, nor does an attendance area necessarily constitute a taxing unit.

Average daily attendance (A.D.A.). The average daily attendance is the quotient obtained by dividing the total number of days of pupils' attendance by the number of school days actually taught.⁶

Bonded indebtedness. The extent to which a school district has issued bonds for (a) purchasing school lots or sites, (b) building or purchasing school buildings, (c) the making of alterations or additions to the school building or buildings, (d) repairing, restoring, or rebuilding necessitated by calamity, (e) supplying of school buildings with furnishings or equipment of a permanent nature, (f) permanent improvement of school grounds, (g) refunding of any outstanding valid indebtedness.⁷

The total amount of bonds issued by a unified district for elementary school purposes, for high school purposes, and for junior college purposes, respectively, shall not exceed

⁶California Education Code, Sections 6911-6941.

⁷Ibid., Sections 7401-7409.

15 per cent of the assessed valuation of the district. A unified district could therefore, issue up to 15 per cent in bonds if all three levels were maintained.⁸

Capital outlay. Expenditures for the acquisition of fixed assets, or addition to such assets, including land, improvement of grounds, buildings, and equipment, provided such expenditures clearly increase the value of the physical properties of the school plant. It can be broadly classified under three headings: (1) Land; (2) Buildings; (3) Equipment. These expenditures must increase the value of the property of the school district and must not be in the nature of replacements or maintenance.⁹

Community. A community is a reasonably compact, natural geographic area which has common economic, social, recreational, religious, and cultural interests. A community ordinarily will furnish most of the needs of its people, while a neighborhood, on the other hand, may furnish only some of the needs of its people, and is a unit within the community.¹⁰

⁸Ibid., Section 4963.

⁹California School Accounting Manual, State Department of Education, Bulletin, Vol. XX, No. 2 (Sacramento: March, 1951) p. 35.

¹⁰John A. Kinnemen, The Community in American Society (New York: F. S. Crofts and Co., 1947), p. 11.

Current expenditures. These are the amounts paid or liabilities incurred for all purposes, including expenses, however, excluding retirement of debt, and capital outlays.¹¹

Dual and unit systems. The dual system, common in California, is one in which there are separate school boards and separate districts for the elementary schools and for the high schools in the same community. A unit system is one in which all school grades, elementary and secondary, are under one school board.

School district. The school district in California is a subdivision of the state, organized and controlled by general law for the purpose of assisting the state in carrying out a governmental function.

School districts have been formed in local areas to operate schools under an elected governing board and within the limits of law, regulations and other requirements. Local districts operate one or many schools. Local governing boards adopt general district policy, employ the district superintendent and other personnel, adopt the district budget, purchase supplies and equipment, and provide for building construction. Boards of certain districts may also adopt courses of study, select textbooks, and perform such other functions as are specifically delegated.¹²

¹¹California School Accounting Manual, op. cit., p.72.

¹²How Can We Organize Our Schools More Efficiently and Economically? The Governor's Conference on Education (Sacramento: September 30 to October 1, 1955).

Elementary district. The elementary district is a school district situated in one county maintaining elementary schools only, which is not located in an incorporated city of a class other than the sixth.¹³

Union elementary district. A union elementary school district may be formed of two or more contiguous elementary school districts lying wholly within the same county.¹⁴

Union High School district. It is a district located in one county, formed by joining two or more elementary districts.¹⁵

Joint Union High School district. It is a school district situated in more than one county maintaining secondary schools only, formed by joining two or more elementary districts, which were, previous to joining, not all located in the same county.¹⁶

Unified school district. A unified school district means a district in which all grades, beginning with the kindergarten or the first grade and extending at least

¹³Education Code, Sections 2451-2464, 2701-2727.

¹⁴Ibid., Sections 2801-2808.

¹⁵Ibid., Sections 3461-3661

¹⁶Ibid., Sections 3491

through grade twelve are under the administration of one board and one superintendent of schools and his staff and are financed through one budget. In some cases a unified district also operates a junior college.¹⁷

Tax rates. School tax rates are quoted on the basis of cents per one hundred dollars of assessed valuation within the district. The maximum rates for the various types of districts, exclusive of bond interest and redemption are:¹⁸

- | | | |
|--|-----------|--------|
| 1. Elementary schools | - - - - - | \$.80 |
| 2. Elementary plus kindergarten | - - - - - | .90 |
| 3. High School | - - - - - | .75 |
| 4. Junior College | - - - - - | .35 |
| 5. Combined high school and junior college | - | \$1.10 |
| 6. In any unified school district the sum of the combinations of the above, included in the unified district, determines the maximum rate. | | |

Districts may exceed the maximum rates by special elections.

¹⁷ The Unified School District in California, State Department of Education, Bulletin, Vol. XXV, No. 6 (Sacramento: September, 1956), p. 1.

¹⁸ Education Code, Sections 6357-6359.

CHAPTER II

RELATED STUDIES PERTAINING TO UNIFICATION

In recent years the burden of responsibility for the successful operation and financing of the public schools has materially increased. In many areas of the state, the people, troubled by the complex problem of providing adequate schools and suitable programs, have sought solutions to their problems. Better organization of school districts has been regarded as one of the methods of improving the situation.

I. HISTORY OF UNIFICATION

As early as 1920 studies began to show the importance of district reorganization and the need for establishing unified school districts. A special legislative committee on education submitted a report in which the following statement was made.

Experience everywhere has clearly demonstrated that the district system is expensive, inefficient, short-sighted, unprogressive; that it leads to unnecessary multiplication of small and inefficient schools, utterly unable to minister to the larger rural-life needs of the present, that under it country boys and girls do not have equivalent educational advantages with the boys and girls who live in the cities; and that it stands today as the most serious obstacle in the way of a needed consolidation and improvement of our rural schools. . .¹

¹California Legislature, Forty-third Session, Report of the Special Legislative Committee on Education as Authorized by Senate Concurrent Resolution Number 21 (Sacramento: 1920), p. 36.

Bills were introduced in almost every legislature since 1920 directed toward effecting reorganization. Specifically, bills were introduced in 1920, 1929, 1931, 1933, 1935, 1937, 1945, 1947, 1949² and each year following. Many of the bills failed to pass one or both houses; others were destroyed in part before passage.

There was, until 1935, no provision in California law for the establishment of the unified district. A law passed in 1935, however, provided for the automatic unification of all districts where the elementary and high school boundaries were coterminous.³ This legislation resulted in the immediate formation of 35 unified districts.⁴ From 1935 until the operation of the California Commission on School Districts, inaugurated in 1945, twelve⁵ additional unified districts came into being.

In January of 1945 the California State Reconstruction and Re-employment Commission issued a report, "The Strayer Report," titled The Administration, Organization, and Financial Support of the Public School System, State of California, in which a comprehensive plan for the improve-

²Harold B. Roberts, "The Problem of School District Organization" (Long Beach, California: California Association of School Administrators, October 20, 1954).

³Education Code, Sections 4641-4642.

⁴Drayton B. Nuttall, "California School District Reorganization," California Schools, XXIV, Nov. 1953, p. 7.

⁵Ibid., p. 7.

ment of existing school district organization was recommended to the State Legislature.

This plan, based upon substantial national experience, called for three provisions of equal importance:

1. A state-wide organization to promote a study of the problem.
2. Provision for reorganization by majority vote in the area under consideration.
3. Financial incentives to areas that reorganize.

In 1945 the Legislature⁶ established a program that included only the first of the three provisions stated above. The second, vote by majority in the area,⁷ was provided by the Legislature in 1947. The third, financial incentives,⁸ was approved by the Legislature in 1951.

As a result of the 1945 Legislature a State Commission on School Districts was created and was empowered to provide procedures for the conduct of surveys throughout the State to determine the need for school district reorganization with particular emphasis on the unified school district. These state-wide surveys resulted in a better understanding of the strengths and weaknesses of existing school districts. As a result, larger and more adequate units of school administra-

⁶Education Code, Section 4881.

⁷Ibid., Section 4919.

⁸Ibid., Section 7031.1

tion were established through a vote of the people, due to the legislative action of 1947. From the beginning of unification in 1935 to the end of the State Commission on School Districts in 1949, fifty-five unified districts⁹ were in operation.

The law providing for optional reorganization of school districts stipulated that the Commission on School Districts should be discontinued October 1, 1949,¹⁰ and that its responsibilities should be turned over to the State Board of Education. The Board has conducted the program since 1949.

In addition, the Legislature in 1949 added provisions for County Committees on School District Organization in each county except San Francisco.¹¹ To carry out this activity of the State Board of Education and to provide technical services for county committees, a Bureau of School District Organization was established by the State Department of Education on October 1, 1949. County Committees were soon organized as provided by law¹² and assumed the responsibility of making the necessary studies and recommendations.

⁹Nuttall, "California School District Organization, 1953-54," California Schools, XXVI, January, 1955, p. 3.

¹⁰Education Code, Section 4882.

¹¹Ibid., Sections 4901-4910.

¹²Ibid.

As a result of county committee activity, 37 additional unified districts were added to the total of 55 which existed in 1949, bringing the total number of unified districts to ninety-two.¹³

In the early 1920's there were approximately 4,000 school districts in California. As of the present school year 1,880 are still in existence. Of these 1,533 are elementary school districts, 233 are high school districts, 22 are junior college districts, and 92 are unified school districts.¹⁴

II. LEGAL PROVISIONS RELATING TO UNIFICATION

Of our existing school organization and its emphasis on the problem of developing a satisfactory legal structure for California schools, the following has been said:

The variety of social and economic conditions of mountain, foothill and valley, urban, suburban and rural, industrial, bedroom and farm must result inevitably in a fairly complex legal structure. When there is added to this complex social and geographical setting a hodge-podge of sixteen or more different varieties of school districts with six or more combinations of grade level responsibilities, the task of developing a comprehensible legal code defies the intelligence of the legal

¹³Nuttall, "Changes in California School District Organization," California Schools, XXVI, Oct, 1955, p. 531.

¹⁴Roy E. Simpson, "Education in California, A Report to the People," California Schools, XXVII, June, 1956, p. 234.

or educational mind. In 1946 we had 540 pages in the Education Code; by 1949 it had grown to 654 pages; in 1951 to 740 pages; in 1953 to 840 pages. A growth in pages of 54 per cent; a growth in complexity to confound the wit of man.

Is this because of the new educational services added in that period or because of educational requirements formulated in that short period? Partly those, but mostly, and this is not said carelessly, because we have sought to substitute legislation for good administrative practice in two-thirds of our districts and we have attempted the impossible task of creating a rational legal plan to govern an irrational district structure.¹⁵

Another authority in a study of existing school legislation reported: First, the laws relating to district organization in California need to be rewritten and greatly simplified. Complications in the many different types of laws at present tend to retard reorganization and to prevent the development of unified districts in many areas. Second, the laws need to be reoriented to place major emphasis on unified district organization rather than on separate elementary and separate secondary districts as at present. Third, procedures for study prior to development of unification proposals need to be revised and strengthened so as to assure that bona fide studies can be made and definite proposals will be developed in all areas. Fourth, procedures need to be developed to assure that once adequate districts are established these districts will not be subdivided under conditions where uneconomical and inefficient reorganization may result. Fifth, that all present laws need to be reviewed with the view to eliminating factors that tend to prevent desirable reorganization and unification, and to abolish financial incentives in existing laws which tend to assure the perpetuation of uneconomical and inefficient districts.¹⁶

¹⁵Harold B. Roberts, "The Problem of School District Organization" (unpublished material, Long Beach, California: Association of School Administrators, October, 1954).

¹⁶Nuttall, "The Unified School District System" (Berkeley, California: American Association for the Advancement of Science, Section Q, December, 1954).

Positive action to sponsor legislation has been taken by many organizations,¹⁷ particularly educational administrators. For example, the California Association of School Administrators has recommended the following legislation:

1. Remove the \$2,400 constitutional guarantee to small districts.
2. Recognize and simplify the laws relating to the formation of unified districts.
3. Recognize the unified district as the basic unit for local school administration in California.
4. Include a more practical provision for comprehensive studies preceding proposals for any district unification, such as:
 - A. Provide funds for study.
 - B. Require county-wide studies.
 - C. Provide for determination of logical attendance centers.
 - D. Proposals to unify should cover entire area of county with separate elections in each area designated as a separate district.
5. That will require these plans for unified districts to be submitted to the people for acceptance within a year.
6. That, if at the polls the people by simple majority do not accept the units proposed, will require county committees to restudy and to submit to the people modified plans, or the same plans the next following year.
7. That, if in the second election the people do not accept recommendations by the respective committees, will establish unified districts in accordance with these or other recommendations of the county committees without further reference to the people.
8. That will require all territory throughout the State be included in some unified district.
9. That will require all component district encumbrances and assets to be leveled throughout each unified district insofar as constitutionally possible.
10. Provide for organization of advisory boards of outlying schools in unified districts.

¹⁷Simpson, loc. cit.

11. Require general administrative credential for any superintendent of a district of seven or more teachers.¹⁸

III. EFFECTS OF UNIFICATION IN DISTRICTS FORMED THROUGH THE COTERMINOUS BOUNDARY ACT

A recent study¹⁹ in 1954 undertook to examine certain factors of the educational program and services and the administrative characteristics of 57 unified school districts formed between 1935 and the close of the 1953 school year through the automatic unification resulting from the coterminous boundary law.²⁰ Questionnaires were sent to all 57 unified districts. Answers were received from 51 districts.

The questionnaire was divided into three sections: first, changes in instructional and special services; secondly, changes in the organization and administration; and thirdly, solely with administration.

Final tabulation of the first section of the questionnaire, dealing with changes in instructional and special services, showed the following changes listed in the order of their importance:

¹⁸Roberts, "The Problem of School District Organization;" Role and Relations of State, County, and District in Public Education, The Governor's Conference (Sacramento: California Association of School Administrators, September 30 to October 1, 1955).

¹⁹Nuttall, Unified School District System.

²⁰Education Code, Sections 4641-4642.

1. Educational goals and objectives of the elementary and high schools were brought more closely together.
2. The Educational program for both elementary and high school levels was planned to meet the developmental needs of all pupils.
3. Development of procedures to aid in the adjustment of pupils going from the elementary into the high school.
4. Pupil cumulative records became more useful and meaningful.
5. Teacher participation in the development of all phases of the curriculum was facilitated and became more meaningful.
6. A more meaningful evaluation or testing program was developed.
7. Construction of a curriculum to meet the needs of all pupils was facilitated.
8. Special services were improved, e.g.
 Attendance and child welfare
 Audio-visual
 Health and physical education
 Pupil guidance²¹

It was apparent that in all cases definite change in terms of improvement was the predominant feeling of those who returned the questionnaire. It was further significant that the matter of coordination of the instructional program from kindergarten through grade twelve was implemented through a greater feeling of unity among the teaching staff, closer cooperation in pupil guidance, coordinated supervisory leadership, better opportunity for teachers to visit schools of other grade levels, establishment of district-wide all grade reading, social studies programs, and teacher

²¹Nuttall, op. cit., pp. 7-8.

committees drawn from all grade levels to study common problems.²²

These favorable comments were not, however, without some reservations. One which clearly must be guarded against is the producing of a district too small to provide all the needed services and yet too large to benefit from the services offered by the county superintendent of schools and his staff. The problem created from over-specialization or training of coordinators, supervisors, and administrators on one level, either elementary or secondary, was noted.²³

In the second section of the questionnaire, dealing with organization and administration, the following changes were noted:

1. The administration of both levels of education achieved a greater unity of purposes and objectives.
2. Financial accounting and reporting systems were simplified by eliminating duplication.
3. Board records were simplified, and it became easier to determine policies adopted by the board.
4. Differentials between high school and elementary school salaries was reduced or eliminated.
5. Personnel procedures were improved.
6. The social and professional gap was reduced between the elementary and high school teacher.
7. Better use was made of existing school buildings and equipment.
8. The change in taxing limits permitted a more flexible use of school monies.

²²Nuttall, loc. cit.

²³Ibid., pp. 8-9.

9. Better coordination of schoolhouse planning was achieved.
10. A plan for standardizing school supplies was developed.
11. Better use of transportation facilities was reported.
12. Greater specialization on the part of appropriate staff members was facilitated.²⁴

One of the most specific comments in this section was the value of the single salary schedule which broke down the barriers between the elementary and secondary staffs. Others were: greater flexibility in the use of school funds, both for current expense and for capital outlay; better use of existing school plant facilities; better planning for capital outlay programs; better community-wide public relations; and better operation under one board and one set of policies for the entire area.

One item which presented some difficulty was the variety of internal organization used by the former districts which had been combined into the unified districts. In some cases schools were organized on the eight-four basis and some on the six-three-three program; however, these difficulties disappeared in time and the end results were beneficial.²⁵

The third section of the questionnaire was concerned with three inquiries; appointing a superintendent; establishment of a single salary schedule; and the handicaps in the operation of a unified district inherent in the California

²⁴Ibid., pp. 9-10.

²⁵Ibid., p. 10.

Education Code. No great significance was attached to the selection of a superintendent although it was noted that unification did not eliminate administrative positions and that former superintendents or other administrative positions of former districts generally remained in these new districts in some sort of an administrative capacity.

In regard to the single salary schedule thirty-seven districts reported a single salary schedule taking effect immediately upon unification or within a period of five or more years.

No particular handicaps inherent in the California Education Code were cited; however, the idea of having separate elementary and secondary levels for purposes of reporting and for certain financial transactions was labeled a nuisance by some.

IV. EFFECTS OF UNIFICATION IN DISTRICTS FORMED SINCE 1944

In another study, undertaken by the United States Office of Education in nine selected states, data were gathered on those unified districts which were organized since 1944. At the time this data were gathered 26 unified districts in California were eligible; however, only 17 districts completed the requested report.²⁶

²⁶Nuttall, Some Changes Effectuated by Unified School Districts Recently Organized in California, May, 1953.

Contained in the 17 newly organized districts were 106 former districts, four of which were not operating any schools. Enrollment in the new unified districts ranged from 177 to 49,281 pupils in October, 1952.

Whereas the old districts were operating 141 elementary schools, 31 junior or senior high schools, and one junior college, the new districts were operating 128 elementary schools, 37 junior and senior high schools, and one junior college. The reduction in the number of elementary schools currently in operation represents the extent to which small schools have been consolidated with others to create larger units. One important item, however, that when necessary, the small schools have been continued.

The improved position of the new districts with respect to the employment of qualified²⁷ teachers was also evident. In these districts one and nine-tenths per cent of the teachers employed before reorganization had less than two years of college training. In the new districts, in 1952-1953, teachers with less than two years had dropped to six-tenths per cent. The proportion of teachers with A.B. degrees increased from 55.2 per cent to 64.9 per cent in the new unified districts.²⁸

²⁷Education Code, Sections 12004 and 12005.

²⁸Nuttall, op. cit., p. 3.

Services to students, such as: testing service, remedial reading instruction, speech instruction, audiometer testing, dental clinic service, and hot-lunch service were greatly improved upon as well as special service personnel, i.e., supervisors, nurses, physician, hygienist, and counselors were also noted.

Additional opportunities for the seventh and eighth grade students was the most significant improvement in curriculum. These opportunities included: shop work, arts and crafts, mechanical drawing, homemaking, music, typing, and science. These additions were generally the result of the establishment of junior high schools. Improvements on the elementary level included: instrumental music, vocal music, remedial reading, arts and crafts, woodshop, kindergarten, and intramural recreation programs.

All districts reported improvements in business and administrative procedures. Most frequently mentioned was the reorganization of maintenance and operation work, transportation of pupils, personnel management, purchasing, and accounting procedures, lunch and cafeteria programs, establishment of warehouses, and handling of supplies and equipment.

V. INDIVIDUAL CASE STUDIES

The four individual case studies presented in the following pages involve unified districts formed under the provisions²⁹ involving study, recommendations and majority vote by the people of the area. They are but brief summaries of intensive investigations conducted by the California State Department of Education. Special efforts were made to separate the information which was gathered so as to clearly differentiate between factual information and opinion on the various points.

Dixon Unified School District.

The Dixon Unified School District was one of the first unifications under the Chapter 16³⁰ provisions. In terms of size, financial ability and lack of barriers to transportation it was ideally situated for district reorganization. Through unification the area involved has been able to eliminate completely all multigraded elementary classes, has kept pace with the steadily growing school enrollment, has provided an excellent educational program in the new district, and has satisfied the great majority of citizens that district reorganization was extremely worthwhile. . . .

. . . Generally, advocates of school district reorganization will find the Dixon situation a very telling example of the advantages of unification.³¹

²⁹Education Code, Sections 4881 and 4919.

³⁰Ibid., Sections 4871-4991.

³¹Nuttall, The Unified School District System, December, 1954.

Hilmar Unified School District.

In this area the concept of greater equalization of educational opportunity through the larger tax base of a unified school district still has not met with favor among those who opposed the unification. This is particularly true in those districts who have contributed to raising the average assessed valuation per pupil. Many people opposed unification on the basis that the school tax rate would be sharply hiked. This, however, has not proven to be true. The fear that all of the attendance centers would be abandoned in favor of a single centralized location proved to be groundless. The consensus of teachers and administrators regarding the extent of coordination between grade levels is that the understanding and ability of the several levels to work together came slowly. Definite steps are being made in this direction not in evidence prior to unification. In this community the principle opposition to change in the type of school district organization was lodged in a cultural conflict in the community. The slight majority vote that created the unified district in no way resolved this conflict. Trustees, laymen, teachers, and administrators were alike in their opinion on this matter. Most of them felt that the unification issue had intensified the differences between the two groups. However, it was noted in all cases that this tense rivalry between two groups in the same community had existed for a long period of time and the question of relative intensity of the conflict was difficult to determine. One longtime business man and resident of the area who considered himself detached emotionally in the situation stated that the nationality difference is the real problem. It is of long standing and will endure. Those people will always vote against bonds and other matters on that basis. . . .

. . . While many advantages within the schools have been achieved the unification as such has not created a unity within the community, because of factors beyond the control of the schools themselves.³²

³²Ibid.

Mariposa County Unified School District.

Mariposa County represents unification over a large, sparsely populated, mountainous terrain. The striking outcomes of unification in the eyes of the citizens in the school district have been, first, extensive progress in the providing of school housing throughout the county, and second, a leveling of educational programs at a high level through elimination of the very poor programs which were offered in a few of the very small districts which had almost no ability to support an adequate educational program. As one citizen explained it, "We haven't gained too much up here but we have real pride in the fact that the whole county is working together, and we have eliminated some of the terrible conditions faced in other parts of our county." Several problems remained to be faced. The school year, 1954-1955, is the sixth year of unification and according to the law,³³ the district loses certain privileges which were offered unified districts for the first five years of operation. The size of the county makes community school relations difficult under present circumstances. The school trustee areas are large, and in at least one case completely broken up by mountain ranges. It would appear that some sort of community school committees are needed to avoid a breakdown in communications between the people and their schools. Some sentimental objection still existed, particularly with longtime residents in parts of the county outside the town of Mariposa. These objections will disappear only with time. Unification is an accepted fact and the main concern at the time of the study was to utilize its potentials to the fullest. It is doubtful if many voters would vote yes on a proposal to restore the original twenty-two school districts.³⁴

The Mountain Empire Unified School District. Approx-
imately one year after the Mountain Empire Unified School

³³Education Code, Section 7031.1.

³⁴Nuttall, op. cit., pp. 15-16.

District started operation, the San Diego County Committee scheduled a meeting to hear firsthand reports on the operation of the district during its first year.

. . . The new Mountain Empire Unified School District has worked out very well since its establishment in December 9, 1952. In determining policy for changes both in the educational program and the operational procedures, the governing board recognized that there must be close co-ordination with community thinking; therefore, there are still some variations in program and procedures in the different areas which were brought together to make up the unified district, however, these differences are tending to decrease as the various neighborhoods identify themselves with the larger community which the unified school district represents. . . .

. . . Important educational improvements noted were: the establishment of a junior high school, the first available in the area; establishment of kindergarten in the area, which would have been impossible under the old set-up, but unification made it possible to finance the program in various centers; and better co-ordination of transportation for high school, junior high school, elementary school, and kindergarten as well as an improved maintenance program. The California State Department of Education cooperated with the district in examining its transportation needs and, in accordance with the regulations³⁵ which apply to newly formed unified school districts, provided the necessary school buses. . . .

. . . Co-ordination in the new unified school district has been much more effective than it was when the area comprised nine districts. The professional staffs of all the schools have been working together as one unit instead of as nine separate units. Uniform business procedures and services have been established for the entire school district. There is now one central business office for the area, and one budget. Many economies, in both time and money, have been realized. . . .

³⁵ Education Code, Sections 7015 and 7017.

. . . Teacher recruitment and retention has been helped greatly by school district reorganization. Teachers know that teaching in a one-room multi-graded situation is a difficult task, and that districts that maintain only one school often cannot pay good salaries. Now, even those teachers assigned to one-room schools have a feeling of belonging to a larger organization, with professional backing and help and a definite salary schedule for all

. . . Most of the elementary schools which came into the new unified district were adequate in size, but a program of modernization, repair, and maintenance has been carried forward so that each of the communities recognizes that its situation has been improved.

. . . The year prior to unification it was discovered that approximately half of the school board members in the area had been appointed by the County Superintendent of Schools because there had been so many resignations. Since the district was unified there hasn't been a single vacancy on the new, elected board. Unification has actually resulted in more local control instead of less, even though there are now seven board members instead of twenty-eight. Each member is now concerned with the educational program of the entire district and not just his area of residence as originally feared. The new board has become the essential link between the people in the area and their schools by reflecting the major concerns and interests of the communities in the total district educational program. . . .

. . . Citizens report that after the first year of operation the new unified school district is accepted by all the communities it serves. Most misgivings about possible difficulties have disappeared. People can see that they now have a much more effective and more complete educational program. They have a new interest in school problems and a new pride in the system. Perhaps the most enthusiastic of all are the pupils themselves, and if the district continues to give them the best school experiences it can, there can be no doubt about its future standing with the community. . . .³⁶

³⁶The San Diego County Committee on School District Organization, "The Mountain Empire Unified School District," California Schools, XXVI (June, 1955).

VI. PROCESS OF FORMING A UNIFIED DISTRICT IN CALIFORNIA

The following outline presented by the California State Department of Education lists in order the steps necessary to form a unified school district.³⁷

1. County Committee selects an area for study for possible reorganization.³⁸
2. County Committee members join with board members of all districts wholly or partially in the area under study to form an "Augmented Committee."³⁹
3. Hold at least three study meetings.⁴⁰
4. If a recommendation for reorganization is to be made, it may be voted on at the third meeting or at a later meeting.⁴¹
5. A majority vote of the Augmented Committee is necessary for adoption of the recommendation. Each school district board has one vote and each of the eleven members of the County Committee has one vote.⁴²
6. The County Committee holds at least one public hearing in the area at least thirty days before their recommendation is submitted to the State Board of Education.⁴³
7. The County Committee notifies the County Board of Supervisors "prior to" submitting their recommendations to the State Board of Education.⁴⁴
8. County Committee submits recommendation to State Board of Education.
9. If State Board of Education approves the recommendation, it shall so notify the County Superintendent of Schools.⁴⁵

³⁷ California State Department of Education, "Brief Outline of the Process of Forming a Unified District in California" (unpublished information, Sacramento).

³⁸ Education Code, Sec. 4902.

³⁹ Ibid., Sec. 4902.05.

⁴⁰ Ibid.

⁴¹ Loc. cit.

⁴² Loc. cit.

⁴³ Ibid., Section 4912.

⁴⁴ Ibid., Section 4915.3.

⁴⁵ Ibid., Section 4911.

10. County Superintendent calls a special election in the affected districts. The County Committee holds at least one public hearing ten days or more before the election.⁴⁶ County Superintendent shall give notice of the hearing at least twenty days before the hearing.⁴⁷
11. County Superintendent shall post notice of election at least twenty days before election date and shall publish it in a newspaper once a week for three consecutive weeks.⁴⁸ County Superintendent shall send copy of County Committee's recommendation to every registered voter at least ten days before election.⁴⁹ County Superintendent shall also send every voter copies of arguments for and against the proposal.⁵⁰
12. A majority of votes cast carries the proposal. If a majority of all votes are cast in one district, the proposal must carry by a majority in that district and by a majority of the combined votes cast in other districts involved.⁵¹
13. If unification is approved by the voters before February 1, the effective date is next July 1. If on or after February 1, effective date is a year from next July 1.⁵²
14. For making preparations for getting new district into operation, unification becomes effective on date that County Superintendent notifies the County Board of Supervisors that the election carried.⁵³

⁴⁶Education Code, Section 4912.

⁴⁷Ibid., Section 4912.1.

⁴⁸Ibid., Section 4914.

⁴⁹Ibid., Section 4915.

⁵⁰Ibid., Section 4915.1.

⁵¹Ibid., Section 4919.

⁵²Ibid., Section 4931.

⁵³Ibid., Section 4932.

VII. SUMMARY AND CONCLUSIONS

It is evident that the establishment of unified school districts in California has resulted in definite, measurable improvements in the operation of schools. Improvements have occurred in: special services rendered to students; curricular offerings and the educational program; goals and objectives of all levels of education; unity of purpose and objectives of administration; financial accounting and reporting systems; use of tax monies; use of existing school buildings and equipment; salary differences of elementary and high school teachers; use of specialized personnel; standardization of school supplies; transportation facilities; teacher training; unity of the teaching staffs; community-wide public relations; maintenance and operation work; interest and pride in school problems by the faculty and citizens; and elimination of many small schools.

Also, on the basis of information presented in this chapter the following conclusions seem warranted:

1. Unification does not solve all problems. Specific steps must be taken to plan and bring about a better program if fundamental improvements are to result from unification.

2. Unification should be preceded by careful and comprehensive studies of all factors involved.
3. No established set of standards can be followed in detail in proposing unified school districts.
4. Until there is a better understanding of the problem of unification and until there are further changes in the laws, unification is likely to proceed slowly.
5. Definite procedures, as set forth in the Education Code, must be adhered to in planning a unified district.

CHAPTER III

CRITERIA OF AN ADEQUATE UNIFIED DISTRICT ORGANIZATION

In an excerpt taken from the minutes of the meeting of the California State Board of Education, July 9-11, 1953, it became the general policy of the Board to:

. . . secure the initiation of local action which, with the approval of the electors of the school districts concerned, would lead to the reorganization of local units of school administration in conformity with present-day standards and conditions. The unified school district seems to be the most nearly ideal plan for school district organization and the formation of such would be given every consideration.¹

In 1955 there existed ninety-two² unified school districts varying in A.D.A. from 183 to 87,235³ pupils and varying in assessed valuations from \$348,313 to \$1,238,980,912⁴ throughout the State. In view of the great deviations in both A.D.A. and assessed wealth among the unified school districts of the State the question of standards for newly unified districts arises.

¹State Board of Education, "Policies of the State Board of Education Regarding School District Organization," California Schools, XXIV, September, 1953.

²Nuttall, "Changes in California School District Organization, 1954-55," California Schools, XXVI, October, 1955, p. 532.

³Calif. State Dept. of Education, "Average Daily Attendance and Selected Financial Statistics of California School Districts, 1954-55," (unpublished research, Bureau of Educational Research, Sacramento), pp. 2a-2c.

⁴Ibid., pp. 3a-3c.

This can best be stated in another excerpt taken from the minutes of the meeting of the California State Board of Education, July 9-11, 1953.

It should be noted that the State Board of Education does not propose to establish fixed arbitrary standards for school district reorganization. The criteria to be used in measuring the value of any proposed change in district organization are those established by research study. These are not rigid, but provide for each local situation to be considered in its own setting and each proposal made by a county committee is to be considered in light of its soundness to the local area concerned. Such a specific solution can be arrived at only through impersonal, scientific study and application of the criteria to each local situation in the State. . . .⁵

It is noted, however, that the California State Board of Education added Article 15.7 to Subchapter 1 of Chapter 1 of Title 5 to the California Administrative Code relating to school district organization standards. These various articles will be mentioned in the following pages under the various subheadings of this chapter.

I. EDUCATIONAL SERVICES

In addition to a complete educational program extending from kindergarten through the twelfth grade, specific services are also necessary to a good school system. The unified school district should provide all educational services recognized by educational authorities, that will provide experiences and give direction to the learner, leading

⁵"Policies of the State Board of Education Regarding School District Organization," op. cit., Sept. 1953.

him to the accomplishment of the desirable objectives of self-realization, human relationships, economic efficiency, and civic responsibility.⁶ The providing of these services requires qualified personnel, proper organization, and adequate leadership.

One authority⁷ cites the following services as necessary: psychological and psychiatric services; special services and opportunities for handicapped children; supervision of attendance; supervision of instruction; health services, such as medical and dental inspection, immunization, prevention and control of infections and contagious diseases, and accident prevention; school community libraries; community recreation; specialized vocational education for youth; and adult education.

Another authority⁸ prescribes the following:

For administrative purposes a school district should employ a minimum of one superintendent in charge of the educational program and one assistant superintendent in charge of business and finance.

For supervisory purposes, a district should employ a minimum of one supervisor for approximately every thirty-five teachers. This does not necessarily imply central staff supervision, even though most studies seem to infer that type of organization. It seems

⁶C. C. Carpenter, "Criteria for Determining the Adequacy of School Districts in California" (unpublished Doctor's dissertation, The University of Southern Calif., Los Angeles, 1948).

⁷Howard A. Dawson, "Size of School Districts in Rural Areas for Proper School Administration," California Schools XXIV, March, 1953, p. 89.

⁸Carpenter, op. cit., pp. 3-4.

reasonable to assume that the supervision could be done by principals, vice-principals, or superior teachers, if the term is used in the sense of helper or supervisor.

. . . Other educational services should be provided, as follows:

- One nurse for every 1,000 pupils;
- One physician for every 3,000 to 4,000 pupils;
- One attendance officer for every 2,500 pupils;
- One psychologist for every 1,000 to 1,500 pupils;
- Library in every school;
- Food service available for every child;
- Adequate provision for extension of the educational program, not only from the kindergarten through the adult education program, but also for the brilliant, the physically handicapped, and the mentally retarded.

An adequate unified school district should be able to provide these services completely; however, it is recognized that some districts will not be able to provide complete educational services and will need supplementary services from the office of the County Superintendent of Schools, or will need to cooperate with other school districts in providing adequate educational services.

The California State Department of Education offers no mandatory list of specific services; however, mention of such is made by the State Department of Education as an objective in the program of developing school district reorganization.

To provide a better and more equalized educational opportunity for all children in the State through the creation of school districts sufficient in size to be able to provide curricular offerings and other services not possible under existing organization.⁹

⁹"Policies of State Board of Education Regarding School District Organization," op. cit., September, 1953.

II. FINANCIAL STRUCTURE

Legislators, educators, and laymen who have thoroughly studied California's school district organization, operation and finance generally agree:

1. Small schools are expensive schools.
2. Many small, unnecessary school districts exist.
3. Many school transportation systems overlap.
4. Some people have much heavier school tax burdens than others.
5. There are great differences in the ability of districts to support schools.
6. Much of the wealth of the State which could be taxed for schools, cannot be taxed because of the kinds of districts which exist.
7. Sound, long-range planning results in economies.
8. The establishment of unified districts may not result in tax reductions but do provide for better use of the tax dollar in current operation and capital outlay.¹⁰

The complicated, overlapping system of school district organization in existence today has made it necessary to have a complicated set of laws for administering the distribution of state school funds. It is necessary to have three separate foundation programs,¹¹ one for the elementary, one for high school, and one for junior college districts. Many districts do not cover sufficient area to bring within their boundaries both residence and employment wealth.

¹⁰Frederick E. Lucas, "Financial Problems in Forming Unified School Districts" (unpublished material issued by the State Department of Education).

¹¹Education Code, Sections 7032.1 - 7038.

Due to the large number of small elementary and high school districts, it has been necessary to provide for "small school foundation programs"¹² in order to provide a decent education for children in small schools. These programs require a sizeable amount of additional funds to compensate for the high costs of small schools. The 1953 Legislature repealed the law which provided this additional assistance only for "necessary"¹³ schools.

Under the present school district organization there are many districts which have very low assessed valuations per pupil, while adjacent districts may have extremely high valuations per pupil. If these were combined into a single administrative unit, the state funds currently available could perform a far better service for all districts than is possible today.

The Constitutional guarantee of basic aid requires thousands of dollars to be distributed to districts which have local ability to meet a larger share of their costs. Better district organization could go a long way toward improving state equalization aid to the districts of California.

In many areas there are three separate tax levies for maintenance and operation and possibly three separate

¹²Ibid., Sections 7031-7039.

¹³Ibid., Sections 7033-7034 and 7037-7037.2.

tax levies for bonds on the same property. These are required for the elementary, high school, and junior college district administration. Reasonable flexibility in operating an educational program for the people is impossible when educational finance is "compartmentalized" into the three levels. If funds were made available for the single purpose of providing education on all levels to a single administration, the cost of administering the program would be materially reduced.

The State's problem, as previously mentioned, is to encourage the establishment of strong, sound unified districts through reorganization which will make available equal tax resources. Such organization will practically equalize the tax burdens of people within districts and should result in better use of the tax dollar through the flexibility which is possible in planning and organization within the district.

Although there are no fixed financial standards in regards to forming new unified school districts, the State Board of Education in 1953 added the following criteria to the California Administrative Code:

The school district should be planned to effect the greatest possible equalization of the local tax base for the support of the educational program. Areas of high assessed valuation per pupil or low assessed valuation per pupil should not be planned as separate districts. Special attention to this criterion should be given of the area involved containing fewer than 10,000 pupils.¹⁴

¹⁴California Administrative Code, Article 15.7, Subchapter 1 of Title 5, Section 155.5.

The law¹⁵ now provides that a unified district comprising either two or three levels may have either a 10 or 15 per cent bonding capacity to be used in the construction of buildings on any level. This gives flexibility and opportunity for a governing board to provide housing facilities and other capital outlay expenditures where the need actually exists.

There is little evidence to show that a system of unified districts would result in any sizeable reduction in expenditure of funds, either for current operation or for buildings. The benefits are largely in other areas. There will always be isolated or necessary attendance centers, but there is no logical reason for such areas being separate administrative units. Several of the rural county areas would be far better off, both educationally and financially, if they were administered as a single administrative unit for elementary and high school purposes.

California is paying a heavy price for its present system of overlapping, complicated, ineffective school districts. It cannot continue to pay the price indefinitely.

III. NECESSARY SIZE

Much has been written about the size, in terms of enrollment, of an efficient and satisfactory unified school

¹⁵Education Code, Section 4714.

district. In many areas the size of the district is determined by the distance pupils may be reasonably transported. Under good conditions transportation routes may be as long as thirty-five miles; whereupon, maximum one-way trips should not exceed fifty to sixty minutes for young people.¹⁶ Without saying, the health and reasonable convenience of the pupils should not be neglected.

The California Administrative Code makes specific mention of size in regards to forming new unified districts:

The school district should be sufficiently large that necessary administration and supervision can be furnished at reasonable cost per pupil, and enough pupils can be included to make a complete educational program feasible.

Wherever the nature of the community or communities will permit, districts should include potentially at least 10,000 pupils in grades kindergarten through 12, or kindergarten through 14. Modification of this standard to create smaller districts should be made only when the factors of isolation and community identity fully justify. Districts with fewer than 2,000 potential pupils should be planned only in extreme cases of isolation or sparsity of population.¹⁷

In California such an enrollment is not always possible, due to reasons mentioned above. As a matter of note, the average daily attendance ranged from 183 to 87,235¹⁸ for the 92 unified school districts as of the 1954-55 school year.

¹⁶Carpenter, "Criteria for Determining the Adequacy of School Districts in California," (unpublished Doctor's dissertation, University of Southern California, Los Angeles, 1948).

¹⁷California Administrative Code, Article 15.7, Subchapter 1 of title 5, Section 155.3.

¹⁸"Average Daily Attendance and Selected Financial Statistics of Calif. School Districts, 1954-55", loc. cit.

On the basis of research the enrollment for attendance areas should be as follows:

The elementary attendance area should have a minimum of six teachers with 150 pupils, and eight teachers for an eighth grade school with a minimum of 200 pupils.

The high school attendance area should serve not less than 250 pupils with not less than ten teachers.

The junior high school attendance area should serve not less than 250 pupils with not less than ten teachers.¹⁹

IV. ECOLOGICAL FACTORS

The areas of the State of California can be considered as three types; rural, urban, and metropolitan. No attempt will be made to establish criteria for metropolitan school districts in this study as most metropolitan areas are now unified school districts because of the coterminous boundary law.²⁰ Furthermore, in planning school district reorganization in California it seems to be a safe assumption to plan on a continued growth of population because of favorable climatic and economic conditions.

Ecological criteria as cited by one authority after considerable research is as follows:

1. School administrative units should form larger community patterns.

¹⁹Carpenter, op. cit., p. 7.

²⁰Education Code, Sections 4641-4642.

2. School attendance units should be coterminous with the community boundaries.
3. Several attendance areas may constitute an administrative unit.
4. Attendance units and administrative units should not necessarily conform to political units.
5. The administrative unit should be as flexible as possible.
6. The attendance unit should be thoroughly democratic.
7. The administrative unit should best fit the interests, the economy, and the culture of the area.
8. Provision should be made so far as possible for local participation, initiative, and control by the people of the district.²¹

In the California Administrative Code mention is made of community identity in regards to school district organization standards:

. . . The school district should include all of the area embraced within the community. The community as used here includes one or more towns or cities and the surrounding territory from which people come for business, social, recreational, fraternal, or similar reasons.

. . . Many existing high school districts are communities that have already been long established. Whenever an existing high school district has within its boundaries a potential enrollment of 2,000 pupils in grades kindergarten through twelve, and represents a clearly definable community, it may be considered for the formation of a separate unified district. The area included in high school districts with a potential enrollment of less than 2,000 pupils should be combined to obtain the advantages of a larger administrative unit . . .²²

²¹Carpenter, op. cit., p. 9.

²²California Administrative Code, Article 15.7, Subchapter 1 of title 5, Section 135.3.

It should be noted that a unified school district may be too large. For example, if an area has two or more complete sociological units and these areas are independently able to provide adequate educational services, they might be justified in forming independent school districts in order to promote greater local participation, initiative, and control.

V. SUMMARY

Although the California State Board of Education has proposed no fixed arbitrary standards for school district reorganization, general criteria to assist County Committees were added to the California Administrative Code in 1953. The criteria to be used in measuring the value of any proposed change in district organization provide for each situation to be considered in its own setting.

The criteria considered in this chapter included: educational services; financial structure; size in terms of enrollment; and ecological factors.

Complete educational services should be provided by the school district for all persons of educable ability. These services should include: a qualified superintendent and assistant; proper ratio of supervisors in relation to the number of teachers; one teacher for each grade; proper number of nurses and physicians in ratio to the number of pupils; health supervision; attendance and welfare officers; libraries;

hot lunch facilities; transportation; and other services as required.

The financial structure should be so organized as to: provide the greatest possible equalization of assessed valuation per pupil; provide for adequate educational services; permit a large enough bonding capacity to finance adequate school housing.

In terms of enrollment the size of the district should provide: both elementary and secondary educational services economically; adequate elementary attendance centers of at least 150 pupils and adequate secondary attendance centers with a minimum of 250 pupils.

Ecological relationships of the school district should provide for: attendance units within the community boundaries; flexibility of the district; local control; community participation; and an administrative unit that best fits the interests, the economy, and the culture of the area.

CHAPTER IV

EXISTING SCHOOL CONDITIONS IN PROPOSED UNIFIED DISTRICT

The 17 school districts included in this study, Figure 1, are located in the northern part of San Joaquin County, and with the exception of two districts, comprise all of the school districts in that part of the County. The New Hope Elementary School District and Oak View Union Elementary School District are the two exceptions and at the present time are a part of the Galt Union High School District. These two districts have been mentioned in another study for proposed unification of the Galt Union High School area.¹

The area proposed for unification in this study is composed of 13 elementary school districts, four union elementary school districts, and one union high school district. At the present time all 17 elementary school districts are sending their high school population to the Lodi Union High School.

The area proposed for unification in this study is flat farming land on which tomatoes, wine grapes, alfalfa, onions, potatoes, wheat, walnuts, rice, barley, and dairy products are the principle crops.

¹Martin A. Cabalzar, "Factors Relating to Unification in the Galt Area" (unpublished Master's thesis, College of the Pacific, May, 1950).

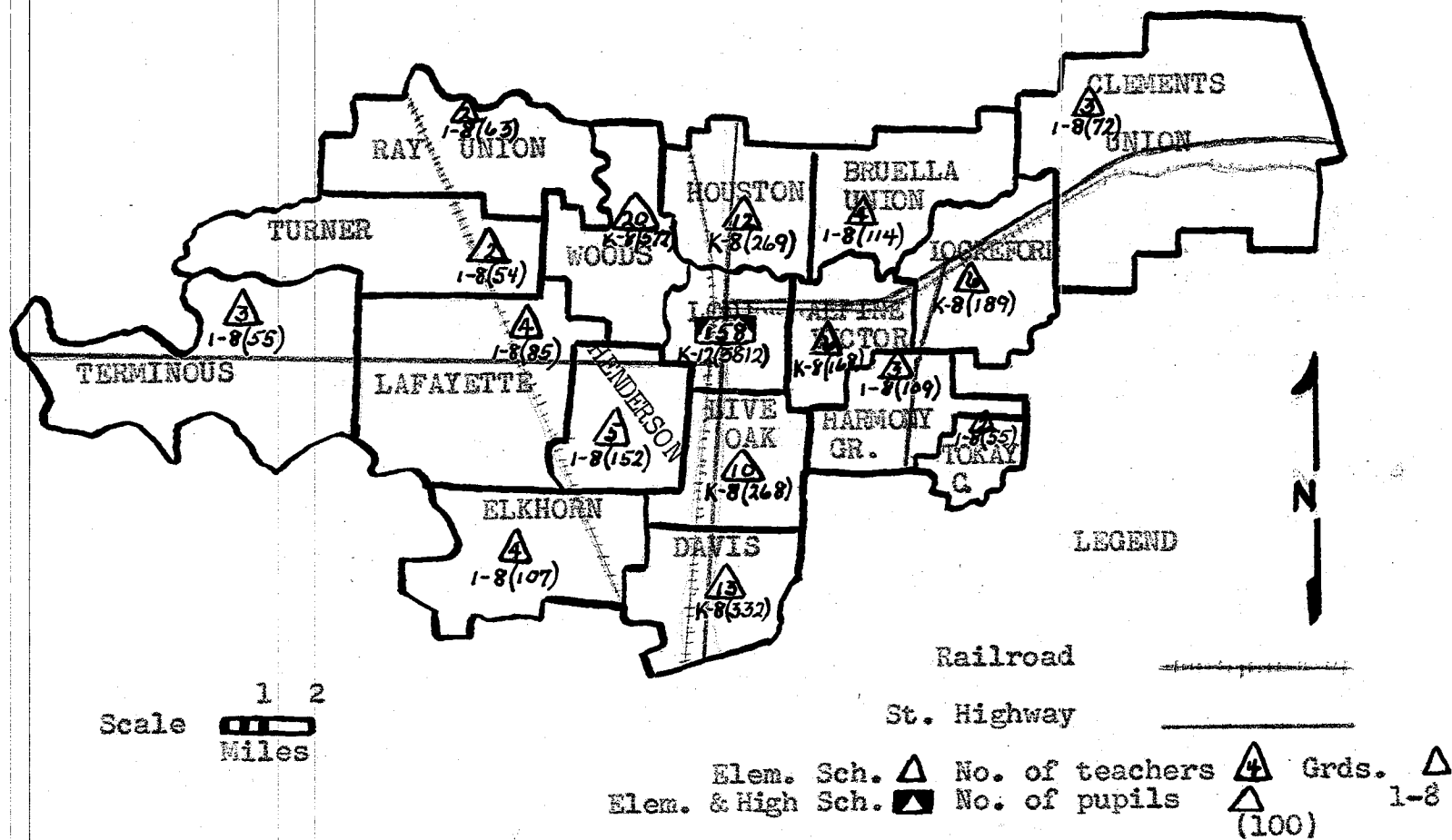


FIGURE 1

EXISTING ELEMENTARY SCHOOL DISTRICTS OF
NORTHERN SAN JOAQUIN COUNTY

In much of the center area, Lodi, Live Oak, and Houston school districts, as well as the southern area, Davis, Elkhorn, and Henderson school districts, suburban housing is rapidly expanding and has placed excessive demands on these school communities.

I. FINANCIAL STATUS

Perhaps no factor has a greater bearing on the reorganization of local school units than the financing of schools. Assessed valuation is the determining factor of the local school district to support education. Assessed valuations are, of course, directly related to the tax rate maintained for the support of education. Accordingly, an examination of certain financial aspects as they relate to the several school districts of the area is in order. This section will consider assessed valuation data, school district tax rates, outstanding bonded indebtedness, and current expenditures per unit of average daily attendance.

Table I shows the assessed valuation as well as the assessed valuation per unit of average daily attendance of the 17 school districts for the school year 1955-56. On the basis of this information the total assessed valuation of the 17 school districts of the area amounted to \$66,529,865.²

²Statistical data obtained from the Office of County Superintendent of Schools, San Joaquin County.

With a total average daily attendance of 6,476 students for all of the schools in the area, elementary and high school, the assessed valuation per pupil would amount to \$10,273. Assessed valuation per unit of average daily attendance in the elementary schools ranged from \$7,746 to \$45,715. The median was \$14,500 per unit of average daily attendance in the elementary schools of the area. The high school assessed valuation per unit of average daily attendance amounted to \$39,909.93.

Table II shows the tax rate and bonded indebtedness of the schools included in this study. It is noted that seven of the elementary school districts as well as the high school district are paying additional tax for bonds. These bonds were for the construction of new buildings. Elementary tax rates for current expenditures ranged from \$.376 to \$1.40 for the school year 1955-56. Total elementary and high school tax rates ranged from \$1.41 to \$2.782 for the same school year.

Table III reveals a range of current expenditures per unit of average daily attendance in the 17 elementary school districts from \$196.98 to \$415.11. The median expenditure for this school year amounted to \$247.00 per unit of average daily attendance. The high school of the area indicated a current expenditure per unit of average daily attendance of \$447.48 for the school year 1955-56.

TABLE I

ASSESSED VALUATION DATA FOR 1955-56, BY EXISTING SCHOOL DISTRICTS IN THE PROPOSED LODI UNIFIED SCHOOL DISTRICT

Name of District	A.D.A.	Assessed Valuation in Dollars	Valuation per Unit of A.D.A.
<u>ELEMENTARY</u>			
Alpine-Victor	168	2,619,065	15,589.67
Bruella Un.	114	2,167,160	19,010.17
Clements Un.	72	1,378,605	19,147.29
Davis	332	3,386,405	10,200.01
Elkhorn	107	1,821,070	17,019.34
Harmony Grove	109	1,467,975	13,467.66
Henderson	152	2,059,365	13,548.45
Houston	269	4,461,185	16,584.45
Lafayette	85	2,394,515	28,170.76
Live Oak	268	3,343,455	12,475.57
Lockeford	189	2,013,435	10,653.09
Lodi Un.	2,145	26,837,105	12,511.47
Ray Un.	63	1,696,020	26,920.95
Terminus	55	1,880,760	34,195.63
Tokay Colony	55	426,030	7,746.00
Turner	54	2,468,635	45,715.46
Woods	572	6,109,080	10,633.71
<u>HIGH SCHOOL</u>			
Lodi Un.	1,667	66,529,865	39,909.93
<u>TOTAL</u>	6,476		

TABLE II

**SCHOOL DISTRICT TAX RATES FOR 1955-56 BY EXISTING SCHOOL
DISTRICTS IN THE PROPOSED LODI UNIFIED SCHOOL DISTRICT**

Name of District	Tax Levied For				Total Tax Rate
	Elem. Main	High School Main	Elem. Bond	High School Bond	
<u>ELEMENTARY</u>					
Alpine-Victor	.900	.750		.284	1.934
Bruella Un.	.800	.750		.284	1.834
Clements Un.	.800	.750		.284	1.834
Davis	.900	.750		.284	1.934
Elkhorn	.800	.750	.322	.284	2.156
Harmony Grove	.800	.750		.284	1.834
Henderson	.800	.750	.046	.284	1.880
Houston	1.250	.750	.386	.284	2.670
Lafayette	.376	.750		.284	1.410
Live Oak	.900	.750	.454	.284	2.388
Lockeford	.900	.750	.216	.284	2.152
Lodi Un.	.844	.750	.390	.284	2.268
Ray Un.	.800	.750		.284	1.834
Terminus	.800	.750		.284	1.834
Tokay Colony	.800	.750		.284	1.834
Turner	.480	.750		.284	1.514
Woods	1.400	.750	.348	.284	2.782
<u>HIGH SCHOOL</u>					
Lodi Un.		.750		.284	1.034

TABLE III

CURRENT EXPENDITURE PER UNIT OF AVERAGE DAILY ATTENDANCE FOR
1952 THROUGH 1956, BY EXISTING SCHOOL DISTRICTS IN THE
PROPOSED LODI UNIFIED SCHOOL DISTRICT

Name of District	Current expenditure per unit of A.D.A.			
	1952-3	1953-4	1954-5	1955-6
<u>ELEMENTARY</u>				
Alpine-Victor	240.76	235.24	268.31	257.47
Bruella Un.	201.97	208.94	254.60	312.54
Clements Un.	250.53	267.41	305.58	273.25
Davis	192.07	200.54	208.01	234.75
Elkhorn	176.06	222.83	245.52	216.24
Harmony Grove	191.27	195.40	188.74	238.39
Henderson	173.96	141.56	197.80	217.51
Houston	274.61	299.68	275.09	327.38
Lafayette	173.27	177.34	197.24	255.28
Live Oak	186.41	210.57	235.76	253.04
Lockeford	169.08	177.79	184.09	196.98
Lodi Un.	210.88	228.20	234.06	249.10
Ray Un.	187.27	226.34	205.38	244.00
Terminous	410.29	327.96	353.39	415.11
Tokay Colony	173.10	207.84	209.22	197.88
Turner	335.51	303.94	335.69	299.10
Woods	214.57	228.27	232.44	240.40
<u>HIGH SCHOOL</u>				
Lodi Un.	356.43	379.17	396.53	447.48

II. ENROLLMENT

Education leaders have recognized the difficulty of providing a satisfactory educational program in schools with small enrollments.³ Where administrative units are small they usually do not have adequate tax resources or school population to develop the various services and enriched curricula of larger attendance centers. The most serious handicaps encountered are: inadequate play experiences, privations of social situations, unavoidable small classes, necessity for multiple grades, inadequate equipment and supplies, and lack of supervisory assistance.

Table IV shows the average daily attendance of the 17 school districts from the school year 1951-52 through 1955-56. In addition the projected enrollment⁴ for the school year 1956-57 is also shown. It is noted, from the data compiled in Table IV, that as of June 1956 there were 4,809 units of average daily attendance enrolled in the 17 elementary school districts and 1,667 units of average daily attendance enrolled in the existing high school serving the area. The total number of students, both elementary and high school

³Dawson, Reeves, et al, Your School District (Washington, D.C.: National Education Association, 1948), p. 79.

⁴Figures obtained from the Division of Education, San Joaquin County.

levels, amounted to 6,476 for the 1955-56 school year. The increase for the past four school years, 1952 through 1955, amounted to 970 pupils, which presents a mean of 323.33 pupils per school year. It is also noted that the projected enrollment total exceeds the mean by approximately 81 pupils.

Table V shows, in addition to the types of school districts and the number of school board trustees, which will be discussed in a later chapter, the number of teachers employed by the various school districts. From this data, it is noted that there were 12 school districts with multiple grade situations. School districts with multiple grade situations represent 66.7 per cent of the total number of school districts in the proposed area.

III. EDUCATIONAL SERVICES

Table VI presents data compiled through various means⁵ regarding eleven educational services which are or are not provided by the various school districts in this study. The responses are either yes or no; however, in some cases the investigator makes mention of standards in regards to these responses.

Adequate library facilities. Of the 17 elementary school districts included in this study only one school

⁵Information gathered from the Division of Education, San Joaquin County, and personal interviews.

TABLE IV

AVERAGE DAILY ATTENDANCE OF SCHOOL DISTRICTS IN THE PROPOSED
LODI UNIFIED SCHOOL DISTRICT FROM 1952 THROUGH 1956

Name of District	Average daily attend- ance by school year			ENROLLMENT	
	1952-53	1953-4	1954-5	Current-1955-6	Projected-1956-7
<u>ELEMENTARY</u>					
Alpine-Victor	155	162	158	168	170
Bruehlla Un.	121	124	122	114	122
Clements Un.	70	68	64	72	75
Davis	274	269	312	332	355
Elkhorn	82	88	101	107	110
Harmony Grove	83	86	97	109	115
Henderson	128	146	146	152	160
Houston	261	263	280	269	275
Lafayette	91	95	84	85	93
Live Oak	248	245	261	268	275
Lockeford	181	188	197	189	195
Lodi Un.	1,733	1,843	2,005	2,145	2,280
Ray Un.	56	63	62	63	63
Terminous	51	58	65	55	58
Tokay Colony	53	52	55	55	57
Turner	41	40	44	54	50
Woods	382	440	489	572	610
TOTAL ELEMENTARY	4,010	4,230	4,542	4,809	5,063
<u>HIGH SCHOOL</u>					
Lodi Un.	1,496	1,618	1,667	1,667	1,817
TOTAL	5,506	5,848	6,209	6,476	6,880

TABLE V

GOVERNING BOARDS OF EXISTING SCHOOL DISTRICTS
IN THE PROPOSED LODI UNIFIED SCHOOL DISTRICT

Name of District	Type of District	No. of Members	No. Children in District	No. Teachers in District
<u>ELEMENTARY</u>				
Alpine-Victor	Regular	3	168	6
Bruella Un.	Union	5	114	4
Clements Un.	Union	5	72	3
Davis	Regular	3	332	13
Elkhorn	Regular	3	107	4
Harmony Grove	Regular	3	109	3
Henderson	Regular	3	152	5
Houston	Regular	3	269	12
Lafayette	Regular	3	85	4
Live Oak	Regular	3	268	10
Lockeford	Regular	3	189	6
Lodi Un.	Union	5	2,145	79
Ray Union	Union	5	63	2
Terminous	Regular	3	55	3
Tokay Colony	Regular	3	555	2
Turner	Regular	3	54	2
Woods	Regular	5	572	20
<u>HIGH SCHOOL</u>				
Lodi Un.	Union	5	1,667	79
TOTAL		66	6,476	257

TABLE VI

EDUCATIONAL SERVICES OFFERED BY EXISTING SCHOOL DISTRICTS
IN THE PROPOSED LODI UNIFIED DISTRICT

Name of District	Library Facilities	Physician & Nurse	Hot Lunch Program	Kindergarten	Supervision	Auditory & Visual Equip.	Physically & Mentally Handicapped	Vocational Education	Instrumental Music	P.E. Facilities	Transportation
<u>ELEMENTARY</u>											
Alpine-Victor	No	No	Yes	Yes	No	No	No	No	Yes	No	Yes
Brucella Un.	No	No	Yes	No	No	No	No	No	Yes	Yes	Yes
Clements Un.	No	No	Yes	No	No	Yes	No	No	Yes	No	No
Davis	No	No	Yes	Yes	No	No	No	No	Yes	Yes	Yes
Elkhorn	No	No	Yes	No	No	No	No	No	Yes	Yes	No
Harmony Grove	No	No	Yes	No	No	No	No	No	No	No	No
Henderson	No	No	Yes	No	No	No	No	No	Yes	Yes	No
Houston	No	No	Yes	Yes	No	Yes	No	No	Yes	Yes	Yes
Lafayette	No	No	Yes	No	No	No	No	No	Yes	No	No
Live Oak	No	No	Yes	Yes	No	No	No	No	Yes	Yes	Yes

TABLE VI (continued)

Name of District	Library Facilities	Physician & Nurse	Hot Lunch Program	Kindergarten	Supervision	Auditory & Visual Equip.	Physically & Mentally Handicapped	Vocational Education	Instrumental Music	P.E. Facilities	Transportation
<u>ELEMENTARY</u>											
Lockeford	No	No	Yes	Yes	No	No	No	No	Yes	Yes	Yes
Lodi Un.	Yes	No	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No
Ray Un.	No	No	No	No	No	Yes	No	No	Yes	Yes	No
Terminous	No	No	Yes	No	No	No	No	No	No	No	Yes
Tokay Colony	No	No	No	No	No	No	No	No	No	No	No
Turner	No	No	No	No	No	No	No	No	No	No	No
Woods	No	No	Yes	Yes	No	No	No	No	Yes	Yes	Yes
<u>HIGH SCHOOL</u>											
Lodi Un.	Yes	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes

district, the Lodi Union Elementary District, maintained a library. Five elementary schools within this district have access to a central library; nevertheless, it is often necessary to supplement this source with books from the County School Library. All other school districts rely on the service provided by the county library system. Selection of books for each class is left up to the individual initiative of the teacher and often the duty is relegated to the county librarian. The Lodi Union High School District does provide library facilities and employs a full time librarian.

School physician and nurse. There is neither a nurse or a physician employed by any of the school districts. One nurse, employed by the San Joaquin Local Health District, does make intermittent visits to the individual districts when time permits or when contacted by a school official. Services provided by the San Joaquin Local Health District include: audiometric testing; dental inspection and care; home visits; enforcement of state health laws; inoculations and vaccinations; screening services; and supervision and coordination of school health services.

Hot lunch program. Fifteen school districts, or 83.3 per cent of the school districts in the area, provide a hot lunch program. Children in other schools must provide their own sack lunches.

Kindergarten. Seven districts, or 41 per cent of the elementary schools in the area, provide kindergarten education. School districts not providing this service either have an insufficient enrollment or have not been requested by the people within the district to provide this service. If this is the case the parents are forced to enroll pupils of kindergarten age in another school district where this service is available.

Supervisory assistance. Not one of the 18 school districts employ supervisors. Supervisory assistance; nevertheless, is provided to all schools through the office of the County Superintendent of Schools. Two supervisors are available in this area; however, their respective territories include five other elementary schools which, of course, limits the number of visitations. Principals, especially in the Lodi Union Districts, are encouraged to supervise their respective teachers inasmuch as the county supervisors do not visit these schools unless requested to do so.

Auditory and visual aids. With the exception of one elementary school all other schools reported some auditory or visual paraphernalia, such as: 16mm sound projector; film-strip projector; record player; or table type radio. When these items were considered in respect to the items listed by the State Department of Education a considerable change in response was noted.

The State Department of Education has furnished as their recommendation the following list of minimum needs for audio-visual equipment:⁶

1. One 16mm. sound projector for every 200 pupils.*
 2. One combination 35mm filmstrip and 2" x 2" slide projector for every 200 students.*
 3. One multiple speed record and transcription player for every 200 pupils.*
 4. One multiple speed record player for every 200 students.
 5. One table-type radio for every 100 pupils.*
 6. Suitable projection surface for each classroom.
 7. One tape recorder for every 200 pupils.*
 8. Mobile projection and audio-equipment tables.
- *- Or one for each building where enrollment is less than the number specified.

In accordance with these minimum needs only five school districts responded yes. This is but 27.7 per cent of the total number of school districts in this area. It is to be noted, however, that any or all of the items, recommended above may be borrowed from the county office of education; nevertheless, scheduling is an all important factor to be considered.

Classes for physically and mentally handicapped. Only two districts, both Lodi Districts, provide special education classes for their handicapped students. Special education classes, either in Stockton or Lodi, are maintained for all other school districts under the supervision of the Office of the San Joaquin County Superintendent of Schools. Candi-

⁶List of minimum needs for audio-visual needs as furnished by the State Department of Education obtained from the Division of Education, San Joaquin County.

dates for these classes are referred to the Coordinator of Guidance Services for screening and assignments.

Vocational education. Vocational education is found only at the high school level and is not offered in any of the existing elementary school districts.

Instrumental music instruction. Fourteen school districts, or 77 per cent of the school districts in this area furnish music instrumental teachers. With the exception of the Lodi Union High School District these teachers are employed only on a part time basis and visit the school but one morning or afternoon a week.

Physical education facilities. In order to evaluate more accurately the existing physical education facilities, the investigator adapted the following list from the California State Department of Education:⁷

I Primary Area

- Climbing apparatus
- Horizontal bar
- Slide
- Paved area for games

II Intermediate and Upper Grades

- Basketball courts
- Softball diamond
- Football field
- Volleyball court
- Soccer field

⁷Van Hagen, Dexter, and Williams, Physical Education in the Elementary School (Sacramento: State Department of Education, 1951), pp. 93-94.

Eleven school districts, or 61.1 per cent of the districts in the area, provided these facilities. It was also noted that several schools did not have an adequate site to provide these facilities.

Transportation. Eight school districts, or 44 per cent, provided bus transportation for their student population to and from school. There was no evidence of a cooperative plan for overlapping transportation routes.

IV. SCHOOLHOUSING

A personal survey made by the investigator of schoolhousing reveals a wide variation in type, quality, and age of buildings used for schools in the northern San Joaquin County. Housing varies from small frame type buildings erected in another century to modern structures properly designed as schools.

Table VII is a graphic report of the capacity and educational adequacy of school buildings as they existed as of June, 1956. The table conforms to the suggested sample form in the Manual for Local Survey Committees⁸ for reporting the capacity and educational adequacy of schoolhousing proposed for reorganization. All distances are in terms of miles from the boundaries of the City of Lodi. Data pertaining to average daily attendance, number of teachers,

⁸Manual for the Study of School District Organization by County Committees (Sacramento: California State Dept. of Education, 1950).

TABLE VII

REPORT OF CAPACITY AND CONDITION OF BUILDINGS IN
THE PROPOSED LODI UNIFIED SCHOOL DISTRICT

Name of District	Number Acres in Site	Type of School	No. of Regular Class Rms	Special Class- Rooms ²	Pupil Capac- ity Bldgs ¹	Year Erected	Type of Constr.	Condition of Bldgs. ³
<u>ELEMENTARY</u>								
Alpine-Victor								
Alpine	4	Elem.	3	Aud. (100)	105	1918	Brick Ven.	B
Victor	2	Elem.	3	Aud. (100)	105	1913	Wd. Frame	D
Bruella	3	Elem.	4	Aud. (110)	130	1911	Wd. Frame	C
Clements	2½	Elem.	3	None	90	1939	Wd. Frame	C
Davis	8	Elem.	Surplus 6 Main 5	None	360	1924	Brick	D C
Elkhorn	5½	Elem.	4	Aud. (100)	140	1952	Masonry	A
Harmony Gr.	4	Elem.	3	None	105	1926	Brick Ven.	C
Henderson	6	Elem.	Main 3 Old 2	Aud. (120)	105 70	1954 1908	Masonry Wd. Frame	A C
Houston	8	Elem.	Main 6 Old 5	Aud. (130)	210 175	1949 1939	Masonry Wd. Frame	A C
Lafayette	5	Elem.	3	None	105	1905	Wd. Frame	D
Live Oak	12	Elem.	9	Aud. (60)	305	1950	Masonry	A

TABLE VII (continued)

Name of District	Number Acres in Site	Type of School	No. of Regular Class Rms	Special Class- rooms	Pupil Capac- ity Bldgs.	Year Erected	Type of Constr.	Condition of Bldgs.
Lockeford	12	Elem.	Main 4 Old 2	Aud. (50)	140 60	1948 1916	Masonry Wd. Frame	A D
Lodi Un. Garfield	5	Elem.	11	None	385	1922	Brick Ven.	B
Washington	10	Elem.	22	Aud. (350)	770	1950	Masonry	A
Leroy Nichols	12	Elem.	21	Aud. (380)	735	1955	Masonry	A
Lincoln	4½	Elem.	9	None	315	1916	Wd. Frame	C
Needham	12	Elem.	27	Aud. (100)	945	1916	Masonry Fr.	B
Ray Un.	4	Elem.	2	None	90	1909	Wd. Frame	D
Terminous	4	Elem.	3	Aud. (90)	105	1916	Wd. Frame	D
Tokay Colony	1	Elem.	2	Aud. (45)	50	1900	Wd. Frame	D
Turner	2½	Elem.	2	None	70	1910	Wd. Frame	D

TABLE VII (continued)

Name of District	Number Acres in Site	Type of School	No. of Regular Class- rooms	Special Class- rooms	Pupil Capac- ity Bldgs.	Year Erected	Type of Constr.	Condition of Bldgs.
Woods	12	Elem.	16	Bungalow Aud. (270)	560	1934 1949 1952	Masonry Masonry Masonry	B A A
<u>HIGH SCHOOL</u>								
Lodi Un.	14	H.Sch.	20	Academic Aud. (500) Lib. (275)	700	1913	Brick	C
			4	Temp.	175	1953	Wood	B
			14	Sc. & H. Ec.	450	1913	Brick	C
			2	Gym	350	1913	Brick	C
				Tumb. rm (35)				
			6	Mus. & Art	210	1954	Masonry	A
			8	Shops	280	1939	Masonry	C
			4	Farm Mec.	120	1954	Masonry	A

1 Computed on basis of 35 pupils per classroom.

2 Mention auditorium, gymnasium, music room, etc.

3 (A) Excellent, (B) Good, (C) Needs extensive repair, (D) Should be abandoned.

and multiple-grade situations refer to the 1955-56 school year.

Alpine-Victor. The Alpine-Victor Elementary School District lies directly to the east of the City of Lodi. Two elementary schools are contained in this district. Alpine School, located approximately three and one-half miles south-east of Lodi on Alpine and Reality Roads, is a brick type building completed in 1918. The condition of this building is rated good and at the present time it serves as a kindergarten through intermediate grade school, housing three classrooms. The Victor School, three miles east of Lodi on State Highway Route 12, is a wood frame type building constructed in 1913. Although this building is in need of extensive repair, it does serve the district as an intermediate and upper grade school, housing three classrooms. Outside toilet facilities are present at the Victor School. Both schools have auditoriums, each with a seating capacity of 100 pupils, which serve as a cafeteria, meeting place, or multiple purpose room. Six teachers were employed by the district and the average daily attendance was 168 pupils. Multiple grades existed.

Bruella Union. The Bruella Union Elementary School is situated six miles north-east of Lodi on the Acampo and Bruella Roads. The school is a wood frame type building

erected in 1911 and houses four classrooms. This building is in need of extensive repairs at the present time. An auditorium is available as a multiple purpose room with a seating capacity of 110 pupils. The average daily attendance was 114 units and four teachers were employed by the district. Multiple grades existed. Grades one through eight were maintained.

Clements Union. The Clements Union Elementary School is located 11 miles north-east of Lodi on State Highway Route 12. The wood frame type building was erected in 1939 but is in need of considerable repair. Three teachers were employed for an average daily attendance of 72 units. Grades one through eight were maintained whereby multiple grade situations existed.

Davis. The Davis Elementary School lies six miles south of Lodi on State Highway Route 99. A brick building, housing five classrooms, was erected in 1924 and is in need of extensive repair. In addition to this building there are two World War II surplus buildings accommodating six classrooms that should be abandoned as soon as possible. Because of the increasing enrollment, these surplus buildings must be used; nevertheless, the district has not solved its building needs and the matter of new construction must soon be faced. Thirteen teachers were employed for an average daily attendance

of 332 units. Grades kindergarten through eight were maintained but there were no multiple grade situations.

Elkhorn. The Elkhorn Elementary School is situated nine miles southwest of Lodi on the Davis Road. A masonry building, completed in 1952, accommodates four classrooms and is in excellent condition. An auditorium, a World War II surplus building, is also present on the site and is used for a cafeteria as well. The seating capacity is 100 pupils. Four teachers were employed and the average daily attendance was 107. Grades one through eight were maintained. Multiple grades existed.

Harmony Grove. The Harmony Grove Elementary School is located on State Highway Route 88 and Harney Lane Road seven miles southeast of Lodi. A brick type building, erected in 1926, is in considerable need of repair although it is presently accommodating three classrooms. An additional classroom must soon be forthcoming if the present enrollment is maintained or should increase. The average daily attendance was 109 units and three teachers were employed. Grades one through eight were maintained and multiple grades existed.

Henderson. The Henderson Elementary School lies four miles southwest of Lodi on Harney Lane and the Lower Sacramento Roads. A masonry building, housing three classrooms, was completed in 1954 and is in excellent condition. In

addition, a wood frame type building, erected in 1908, houses two classrooms and an auditorium, capacity-120 pupils, but is in need of considerable repair. The average daily attendance was 152 and five teachers were employed. Grades one through eight were maintained and multiple grades existed.

Houston. The Houston Elementary School is located three miles north of Lodi on State Highway Route 99 and Acampo Road. A masonry building, completed in 1949, houses six classrooms and is in excellent condition. A wood frame type building, erected in 1939, accommodates five classrooms, as well as an auditorium with a seating capacity of 130 pupils. This building is in need of considerable repair. Twelve teachers were employed by the district for an average daily attendance of 269 units. Grades kindergarten through eight were maintained; however, multiple grade situations did not exist.

Lafayette. The Lafayette Elementary School lies three miles west of Lodi on State Highway Route 12. A wood frame type building, erected in 1905, accommodates four classrooms although originally designed for three. This building should be abandoned as it is totally inadequate in every respect. Outside toilet facilities were also present. The average daily attendance was 85 units and four teachers were employed. Grades one through eight were maintained and multiple grades existed.

Live Oak. The Live Oak Elementary School is situated three miles south of Lodi on State Highway Route 99 and Wyandot Road. A masonry building containing nine classrooms was completed in 1950 and is in excellent condition. A small auditorium, seating capacity 60 pupils, is also present on the site. Ten teachers were employed for an average daily attendance of 268 units. Grades kindergarten through eight were maintained but no multiple grade situations existed. A masonry building, constructed in 1948, containing four classrooms is in excellent condition. There also exists a wood frame type building, erected in 1916, containing two classrooms that should be abandoned. In addition, there is a small auditorium with a seating capacity of 50 pupils. The average daily attendance was 189 and six teachers were employed for grades kindergarten through eight. Multiple grades existed.

Lodi Union. Five schools exist in the Lodi Union Elementary School District, each of which will be discussed separately.

Garfield. The Garfield Elementary School is located on Garfield and Flora Streets in the City of Lodi. A brick building, constructed in 1922, accommodates 11 classrooms and is considered in good condition. A school site of only five acres limits any possible additions in the future.

Grades kindergarten through sixth were maintained during the 1955-56 school year with an average daily attendance of 315 pupils. The staff amounted to eleven teachers.

George Washington. The George Washington Elementary School is located at West Lockeford and North Orange Streets in Lodi. A masonry building, completed in 1950, houses 11 classrooms and a multiple purpose room and is in excellent condition. In 1955 an additional 11 classrooms were added to the existing wing. Grades kindergarten through sixth were maintained by nineteen teachers during the 1955-56 school year. The average daily attendance amounted to 519 pupils during the same year.

Leroy Nichols. The Leroy Nichols Elementary School is located at Kettleman Lane and Crescent Avenue. A masonry building, constructed in 1955, houses nine classrooms as well as an auditorium and is considered in excellent condition. An additional wing of 14 classrooms was recently completed in 1956. During the 1955-56 school year nine teachers were maintained for grades kindergarten through sixth. The average daily attendance during this same period amounted to 270 pupils.

Lincoln. The Lincoln Elementary School is located on State Highway Route 99 and Pine Street. The original

masonry and wood building, erected in 1916, houses nine classrooms and is in need of repair. A site of only four and one-half acres, as well as the location of the school on an extremely busy State Highway, presents a problem of usefulness in the future. The average daily attendance amounted to 273 pupils. Grades kindergarten through sixth were maintained by nine teachers.

Needham. The Needham Elementary School is located at Chestnut and South Church Streets in Lodi. The original building, constructed in 1916, and a wing of undetermined origin house 23 classrooms and is considered in good condition. In addition, a kindergarten wing, constructed in 1954, houses four classrooms and is also considered in excellent condition. An auditorium is also included in the original building with a seating capacity of 100 pupils. Teachers employed numbered 27, and grades kindergarten through eighth were maintained. The average daily attendance amounted to 767 pupils during the 1955-56 school year. Although the school represents the largest elementary school throughout the entire area under study, the site, consisting of 12 acres, is large enough to maintain such an enrollment.

Lockeford. The Lockeford Elementary School is located seven miles west of Lodi on State Highway Route 12 and Tully Road. A masonry building, constructed in 1948, containing

four classrooms is in excellent condition. There also exists a wood frame structure, erected in 1916, containing two classrooms that should be abandoned. In addition, a small auditorium with a seating capacity of 50 is also present on the site. The 1955-56 school year found an average daily attendance of 189, and six teachers were employed for grades kindergarten through eight. Multiple grades did exist.

Ray Union. The Ray Union Elementary School is located eight miles northwest of Lodi on the Ray and Peltier Road junction. A wood frame building, erected in 1909 and with outside toilet facilities, accommodating two classrooms should be abandoned. Grades one through eight, for an average daily attendance of 63 pupils, were maintained in multiple grade situations. Two teachers were employed.

Terminous. The Terminous Elementary School is situated 13 miles west of Lodi on State Highway Route 12. The three classroom building is a wood frame type constructed in 1916. In addition to the three classrooms there is also an auditorium with a seating capacity of 90 pupils. Even though the building is well maintained it, too, should be abandoned. Average daily attendance was 55 units as of 1955-56, and three teachers were employed. Multiple grades, one through eight, existed.

Tokay Colony. The Tokay Colony Elementary School is

located 10 miles southeast of Lodi on the Tokay and Jack Tone Roads. The two classroom wood frame building, erected in 1900, should be abandoned at the earliest possible time. In addition to having but one acre for the school site, outside toilet facilities are also present. A very small and old auditorium is also present on this inadequate site. Two teachers are employed to maintain multiple grade situations for an average daily attendance of 55 pupils. Grades one through eight are maintained.

Turner. The Turner Elementary School is situated five miles northwest of Lodi at the Turner and Ray Roads. A wood frame building, housing two classrooms and constructed in 1910, should be abandoned. Outside toilet facilities are also present. Two teachers are employed to maintain multiple grade classes for an average daily attendance of 54 pupils. Grades one through eight were maintained.

Woods. The Woods Elementary School is located two miles northwest of Lodi on the Lower Sacramento and Turner Roads. Three masonry buildings forming a single unit were constructed in 1922, 1934, and 1952, and form an excellent building, housing 14 classrooms, a cafeteria, and an auditorium with a seating capacity of 350 people. In addition, there is also a kindergarten wing, completed in 1949 and containing two classrooms, which is almost a separate part

of the main building. Also present on the site is a bungalow which is used for music and meetings of various sorts. Grades kindergarten through eight are maintained, and 16 teachers are employed by this district.

Lodi Union High School. The Lodi Union High School is located at Hutchins and Walnut Streets in the City of Lodi. Original buildings, erected in 1913, have been added to and surrounded by other structures during the past 43 years, keeping up with the ever increasing enrollment. However, during this expansion of the building program the original site of 14 acres was not increased. As a result, the 1955-56 school year found a student population of 1667 congested in the various types of classrooms on the original site of only 14 acres. The building program has virtually used up all of the available site. In order to bring this phase of the plant up to standard, it would require the addition of 10 to 15 acres of land, a requirement that does not seem to be practicable at the present location of the school.

A survey⁹ dating back as far as 1947 found the following rooms utilized considerable above the approved standards: academic or non-specialized, commercial, art,

⁹Hart and Peterson, "A Report of a Survey of Public Education in the Lodi Union High School District" (unpublished material, December, 1947).

mechanical drawing, science, sewing, shops, and both gymnasiums. The general conclusion of this survey indicated that if the plant were to be continued as a four-year high school considerable expansion would be necessary. As mentioned in the previous paragraph, this requirement does not seem to be practicable at the present location of the school.

Inasmuch as the Lodi Union High School District, in June of 1955, passed a bond issue to the extent of \$2,300,000 for the construction of a new high school plant, little more need be mentioned of this existing plant other than its proposed future service as a junior high school. Little or nothing can be said about the plans for the future plant as this matter has only progressed to the primary stages. With some repairs and modernization the former plant with its present facilities should serve admirably the needs of a junior high school.

During the 1955-56 school year, 79 teachers were maintained for an average daily attendance of 1,667 units. All buildings, with the exception of the music and agriculture and temporary classrooms, were in some need of repair or modernization.

V. ECOLOGICAL FACTORS

Figure 1, page 49, shows the boundaries of the 17 elementary school districts, which in turn form the outlying

boundary of the present Lodi Union High School District. In the center of this area proposed for unification can be found the City of Lodi, the largest city in northern San Joaquin County. The 17 elementary school districts comprising the Lodi Union High School District embody a community which is fairly homogeneous insofar as its social, economic, and educational interests are concerned. The City of Lodi forms the nucleus of this community.

The City of Lodi, incorporated in 1906, has a present estimated population of 18,500. Although the area of the City of Lodi is but four square miles, the area of the Lodi District is in excess of 387 square miles. The population of this district, or retail trading area, is estimated at 40,000.

Lodi has the Council-Manager type of government. Bonded indebtedness of the city is nil at the present time. Lodi is a church-going community and nearly all denominations are represented. Recreation facilities are considered excellent and the City Recreation Department offers a well-planned year-round program for people of all ages. The fact that 82 per cent of the homes in Lodi are owner-occupied gives factual evidence of pride the people take in their homes and community.

Lodi is strategically located from the standpoint of markets and raw materials, and offers a skilled labor

supply of dependable home-owning workers. There are 251 acres in the city limits zoned for light industry and approximately 2,500 people are employed in the industrial field. Although grapes and wine are the predominant crops, the district is highly diversified. In addition to orchard crops there are vast acres of celery, asparagus, potatoes, onions, grains, sugar beets, and rice. Livestock and poultry raising also play a large part in the farming field.

Transportation, as pictured in Figure 1, page 49, to and from Lodi make all parts of the proposed unified area easily accessible. State Highway Route 99 runs in a north and south direction cutting through the Davis, Live Oak, Lodi, and Houston School Districts and serves as a main arterial route to and from the City of Lodi. Bisecting State Highway Route 99 on the east and west is State Highway Route 12, cutting through the Terminous, Lafayette, Henderson, Lodi, Alpine-Victor, Lockeford, and Clements Union School Districts. Two major railroads also serve the area: The Western Pacific and the Southern Pacific, the latter of which runs through the City of Lodi. In addition bus service is provided by the Gibson and Greyhound Lines.

VI. SUMMARY

The 18 school districts included in this study comprise all of the school districts in the northern part of

San Joaquin County, with the exception of two districts: New Hope and Oak View Elementary School Districts. This area, proposed for unification in this study, represents 13 elementary school districts, four union elementary school districts, and one union high school district. Excessive demands have been placed on many of these districts due to the rapid expansion of suburban housing.

An examination of the financial status of the 17 elementary school districts revealed a total assessed valuation of \$66,529,865. Total assessed valuations do not, however, take into account variations in the number of pupils in the schools. Consequently, a measure of locally taxable wealth per pupil is employed as the standard factor of the comparative financial ability of school districts. This measure is the assessed valuation divided by total average daily attendance, or assessed valuation per average daily attendance. Considering an average daily attendance of 6,476 pupils for the entire 18 school districts, elementary and high school, during the 1955-56 school year the assessed valuation per pupil amounted to \$10,273. Assessed valuation per average daily attendance in the 17 elementary school districts ranged from \$7,746 to \$45,715, which presented a median of \$14,500 per unit of average daily attendance. On the other hand, the high school assessed valuation per unit of average daily attendance amounted to \$39,909.93. Elementary tax rates varied from

\$.376 to \$1.40 while the combined elementary and high school tax rates ranged from \$1.41 to \$2.782. Seven elementary school districts as well as the high school were bonded for building purposes. Current expenditures per average daily attendance in the 17 elementary school districts ranged from \$196.98 to \$415.11, which presented a median of \$247.00. The high school current expenditure per unit of average daily attendance amounted to \$447.48.

Enrollment increases in the past four years amounted to 970 units of average daily attendance, which presented a mean of 323.33 units of average daily attendance per school year. The projected enrollment for the 1956-57 school year, however, was expected to exceed the mean by approximately 81 pupils, which indicates an increase of 404.33 pupils. Twelve school districts, or 66.7 per cent, reported multiple grade situations.

Educational services provided by the 18 school districts indicated the following results: adequate library facilities, one school district; school physician and nurse, none of the districts; hot-lunch program, 15 school districts; kindergarten, seven districts; supervisory assistance, none of the districts; auditory and visual aids, five districts; classes for physically and mentally handicapped, two districts; vocational education, one district; instrumental music, 14 school districts; physical education

facilities, 11 districts; and transportation, eight school districts. It was noted, however, that the San Joaquin County Office of the Superintendent provided assistance in the following services: library facilities, supervision, auditory and visual aids, and physically and mentally handicapped classes which, of course, enabled all of the school districts to offer these services which they could not normally afford.

Schoolhousing varied widely throughout the 17 elementary school districts. Ratings of elementary school buildings indicated: eight buildings should be abandoned; seven buildings were in need of extensive repairs; four buildings were considered good; and nine buildings were considered excellent. In addition, it was found that three school sites were below standards set by the California State Department of Schoolhousing.

The high school housing situation found all buildings, except the new music, agriculture, and temporary classrooms, in need of repairs or modernization and the utilization of the buildings to the point of congestion. A site of only 14 acres constituted an impracticable situation for any additional expansion.

The 17 elementary school districts comprising the Lodi Union High School District embody a community which is fairly homogeneous insofar as its social, economic, and

educational interests are concerned. The City of Lodi forms the nucleus of this community. The area of the Lodi District, or retail trading area, is in excess of 387 square miles with an estimated population of 40,000. The City of Lodi is strategically located from the standpoint of markets and raw materials and is highly diversified. Transportation to and from Lodi make all parts of the proposed unified area easily accessible.

CHAPTER V

REVIEW AND INTERPRETATION OF EXISTING SCHOOL CONDITIONS IN RELATION TO THE CRITERIA OF AN ADEQUATE UNIFIED SCHOOL DISTRICT

It is the intent of this chapter to review and interpret the findings of Chapter IV, regarding existing school conditions in the 18 northern San Joaquin County school districts proposed for unification, in relation to the criteria of an adequate unified school district as described in Chapter III. It is also the intent of this chapter to compare these findings with other unified districts throughout the state whenever possible. This interpretation will concern itself with the following items: financial status, educational services, enrollment and schoolhousing, and ecological factors.

I. FINANCIAL STATUS

As summarized in Chapter III, the financial structure should be so organized as to: effect the greatest possible equalization of the local tax base for the support of the educational program; permit a large enough bonding capacity to finance adequate schoolhousing; and combine districts of low assessed valuation and high assessed valuation.

The basis for all local school support is the assessed valuation of local property. Assessed valuation, as shown in Table I, page 52, ranged from \$426,030 to \$26,837,105 among the 17 elementary school districts within this proposed unified area. Not only is the assessed valuation directly related to the tax rate established by the school district, but it is also the basis for determining the bonding capacity of a district. From the variances of assessed valuations as stated above, it would seem that many districts are more capable than others to support an educational program.

Total assessed valuations, however, do not take into account variations in the number of pupils in the schools. Consequently, a measure of locally taxable wealth per pupil is employed as the standard factor of the comparative financial ability of school districts. This measure is the assessed valuation divided by the total average daily attendance, or assessed valuation per average daily attendance.

Assessed valuation per unit of average daily attendance in the 17 elementary school districts, Table I, ranged from \$7,746 to \$45,715, whereas, the median for the 17 elementary school districts amounted to \$14,500 per unit of average daily attendance. This would indicate that eight districts have the ability to meet a larger share of the costs than the districts which have an assessed valuation of less than \$14,500 per unit of average daily attendance or less.

In regard to tax rates it was also noted that some school districts have heavier burdens than other districts. Elementary tax rates ranged from \$.376 to \$1.748 while combined elementary and high school tax rates varied from \$1.41 to \$2.782. The two districts having the lowest tax rates also had the highest assessed valuation per average daily attendance and could easily afford to meet a larger share of the costs to equalize the overall educational program. The same could be said for other districts with high assessed valuations per unit of average daily attendance.

The amount expended per pupil is an indirect measure of the effort expended to provide public school support. It is also a measure of the level of the educational program provided. Current expenditures per unit of average daily attendance in the 17 elementary school districts ranged from \$196.98 to \$415.11 for the 1955-56 school year. The median current expenditure of \$247.00 would indicate that eight districts are paying excessive amounts to support their education programs. The state median current expenditure per unit of average daily attendance for elementary schools was \$272.08.¹ The current high school current expenditure per unit of average daily attendance amounted to \$447.48 as

¹California Teachers Association, "Preliminary Information on California Teachers Association, 1957 School Finance Legislation" (unpublished material issued by California Teachers Association, San Mateo, 1957), p. 26.

compared to the state median of \$416.79.²

The total bonding capacity of the 17 elementary school districts, considering five per cent of the total assessed valuation of \$66,529,865 would amount to \$3,326,493.25. This amount, however, would be reduced inasmuch as seven elementary school districts, Table VIII, pages 90, 91, already have outstanding bonds. As of July 1, 1956, the outstanding indebtedness of the 17 elementary school districts amounted to \$1,525,000 or 46 per cent of the total bonding capacity. The same bonding capacity would also be true of the high school district, however, as of July 1, 1956, the outstanding bonded indebtedness for this level of education amounted to \$2,265,000 or 68 per cent of the total bonding capacity. The total bonding capacity of the area would amount to \$6,652,986.50 providing there were no outstanding bonds.

In comparison to other established unified school districts throughout the state, this area proposed for unification would rank eighteenth out of 89³ unified school districts in terms of total assessed valuation. In terms of assessed valuation per unit of average daily attendance on the elementary level the median of \$14,500 for the 17 elementary school

²Ibid.

³California State Dept. of Education, "Average Daily Attendance and Selected Financial Statistics of California School Districts, 1954-55" (unpublished research issued by the Bureau of Educational Research, February, 1956).

TABLE VIII

SUMMARY OF OUTSTANDING BONDED INDEBTEDNESS AS OF
JULY 1, 1956, BY EXISTING SCHOOL DISTRICTS IN
THE PROPOSED LODI UNIFIED SCHOOL DISTRICT

Name of District	Total Bonds Outstanding	Final Date of Maturity	% - Bonds of Total Assessed Valuation
<u>ELEMENTARY</u>			
Alpine-Victor	None		
Bruella Un.	None		
Clements Un.	None		
Davis	None		
Elkhorn	\$ 65,000	6/30/70	.036
Harmony Grove	None		
Henderson	47,000	10/15/74	.023
Houston	98,000	9/1/57 (4,000) 5/1/68 (24,000) 12/1/62 (70,000)	.022
Lafayette	None		
Live Oak	105,000	4/15/59 (21,000) 5/1/70 (84,000)	.031
Lockeford	62,000	1/1/72 (46,000) 6/15/72 (16,000)	.031

TABLE VIII (continued)

Name of District	Total Bonds Outstanding	Final Date of Maturity	% - Bonds of Total Assessed Valuation
<u>ELEMENTARY</u>			
Lodi Un.	\$1,045,000	5/1/57 (7,000) 6/15/69 (450,000) 8/15/69 (588,000)	.031
Ray Union	None		
Terminous	None		
Tokay Colony	None		
Turner	None		
Woods	103,000	4/15/57 (2,000) 6/15/63 (101,000)	.017
Total	1,525,000		.46
<u>HIGH SCHOOL</u>			
Lodi Un.	2,265,000	6/1/75	.034
Total	2,265,000		.68

districts is well above the median of elementary schools in unified districts, which is \$10,486.00.⁴ The high school assessed valuation per unit of average daily attendance amounted to \$39,909.93 as compared to \$34,824.00⁵ for other high schools in unified areas.

II. EDUCATIONAL SERVICES

As previously stated in Chapter III authorities in the field of education agreed that in addition to a complete educational program, extending from kindergarten through the 12th grade, a good school system should offer other specific services. The realization of these services should provide a better and more equalized educational opportunity for all the children in the area.

Table VI, pages 59, 60, listing eleven educational services and the various responses by school districts, found the following services inadequate: library facilities, physician and nurse, kindergarten, supervisory assistance, auditory and visual equipment, classes for physically and mentally handicapped, vocational education, and transportation. However, with the assistance of the San Joaquin County Office of the Superintendent of Schools,

⁴Ibid., p. 3a.

⁵Loc. cit.

16 of the elementary school districts were able to augment the number of services they could provide. These services, provided by the Superintendent of Schools to those districts which they in turn could not afford, included: library facilities, supervisory assistance, auditory and visual equipment, and the maintenance of physically and mentally handicapped classes. In other services such as: kindergarten, vocational education, instrumental music, adequate physical education facilities, and transportation, responses varied. The varied responses could be due to numerous reasons: inability to finance the service; not enough parental pressure brought to bear; or no logical reason to undertake such a service.

This proposed area for unification with its present enrollment of 6,476 units of average daily attendance might well afford all of these services without the help of the County Superintendent of Schools, providing, of course, a single administrative unit were used. If this were the case the new district, in terms of the criteria established in Chapter III, would have to provide library facilities for all attendance centers, employ six nurses and two physicians, provide cafeteria units at each attendance center, provide necessary transportation to all attendance centers, employ seven supervisors, relocate auditory and visual equipment, provide classes for the handicapped,

provide vocational education and instrumental music at those attendance centers which warrant these services, and provide adequate physical education equipment at all attendance centers.

Equalization of these services, even if County assistance might be needed, would provide an equal educational opportunity for all students.

III. ENROLLMENT AND SCHOOLHOUSING

As shown in Table IV, page 57, the total enrollment as of the 1955-56 school year in the proposed area amounted to 6,476 pupils per average daily attendance. To reach a potential enrollment of 10,000 pupils, as recommended in the California Administrative Code, in grades kindergarten through grade 12, an estimated ten years would be required. The number of years is derived by using a mean growth of 323.22 pupils per school year. Inasmuch as the nature of this area will not permit such a present enrollment of 10,000 pupils without infringing on other high school populations or other unified districts, community identity must then be considered the deciding factor in terms of size. The California Administrative Code states:

... modification of the standard of a potential enrollment of 10,000 pupils to create smaller districts should be made only when the factors of isolation or community identity fully justify.⁶

⁶Calif. Administrative Code, Article 15.7, Sec.135.3.

Ecological factors presented in Chapter IV establish the community identity of this area. The community identity in this area is the City of Lodi where the people come for business, social, recreational, fraternal, or similar reasons. Even with an enrollment of 6,476 pupils per average daily attendance for the 1955-56 school year, the proposed unified district would rank twenty-fifth⁷ with other established unified districts in the state in terms of average daily attendance.

As stated in Chapter III, educational authorities recommended the following enrollments for attendance centers:

The elementary attendance area should have a minimum of six teachers with one hundred and fifty pupils, and eight teachers for an eight grade school with a minimum of two hundred pupils.

The high school attendance area should serve not less than two hundred and fifty pupils with not less than ten teachers.⁸

Examination of Table V, page 58, revealed that only five school districts, or 29 per cent, employed eight or more teachers and had a student enrollment of 200 pupils or more. This would indicate that many schools are too

⁷"Average Daily Attendance and Selected Financial Statistics of California School Districts, 1954-55" (unpublished research issued by Bureau of Education Research).

⁸Carpenter, op. cit., p. 7.

small in terms of adequate enrollment and that future attendance centers should be planned to eliminate some of these small schools whenever possible.

The present high school enrollment is too large in view of the small school site and available facilities. This situation will be remedied in the near future, however, as a new high school is currently under construction. The present site will serve as a junior high school.

In regard to attendance centers it is recommended that wherever possible elementary schools should have not more than one grade per teacher.⁹ It was noted in Table V that twelve school districts, or 66.7 per cent, reported multiple grade situations. This situation could easily be remedied if future attendance areas were carefully planned.

Transportation was not a vital factor in determining the size of this proposed unified area as all school districts are closely knit together. No two schools in this area are more than 23 miles apart. The maximum distance from east to west in the proposed area is but 32 miles, while the maximum distance from north to south is but 14 miles.

⁹California Administrative Code, Article 15.7, Section 135.4.

IV. ECOLOGICAL FACTORS

A school district, as stated in the California Administrative Code, should:

. . . Include all of the area embraced within the community. The community as used here includes one or more towns or cities and the surrounding territory from which people come for business, social, recreational, fraternal, or similar reasons. . . .¹⁰

The community involved in this study is the City of Lodi. The area proposed for unification does include a clearly recognized area of community interest inasmuch as the people in the surrounding districts are homogeneous insofar as social, economic, and educational interests are concerned. The present Lodi Union High School District firmly establishes community boundaries; however, the administrative units within these boundaries are not coordinated for the complete educational program, kindergarten through Grade 12. Only in the Lodi Union Elementary School District is there a coordinated program for all schools administered by a superintendent. Attendance centers, which now exist, do conform to community boundaries; however, any new attendance centers would have to bear in mind the boundaries that now exist.

¹⁰Ibid., Article 15.7, Section 135.3.

In order to provide local control, flexibility of the district, and community participation, five or seven trustee¹¹ areas would have to be planned and a trustee elected from each area for proper representation.

Instead of 18 administrative units now serving the area and a total of 66 trustees, Table V, now necessary to govern the educational program of 18 school districts, one administrative unit and one Board of Trustees could properly and more efficiently govern the educational program of all districts. This one administrative unit would then be composed of several attendance units instead of the situation that now exists. Naturally, this administrative unit should fit the interests, the economy, and the culture of the area.

V. SUMMARY

The financial ability of the 17 elementary school districts included in this study varied considerably in capability to support an educational program. Assessed valuations varied from \$426,030 to \$26,837,105 among the 17 elementary districts, while the more standard factor of the comparative financial ability of school districts, the the assessed valuation per unit of average daily attendance ranged from \$7,746 to \$45,715. The median of \$14,500 would

¹¹Education Code, Section 4905.

indicate that eight districts have the ability to meet a larger share of the costs. Tax rates, varying from \$1.41 to \$2.782 for combined elementary and high school support, also provide evidence that some school districts have a heavier financial burden than others. A median current expenditure of \$247.00 per unit of average daily attendance would also indicate several districts are paying large amounts to support their respective educational programs.

The bonding capacity of the 18 school districts would amount to \$6,652,986.50; however, this does not take into consideration the present outstanding bonded indebtedness. As of July 1, 1956, the outstanding indebtedness of the 17 elementary school districts amounted to \$1,525,000, or 46 per cent of the total bonding capacity. As of the same date, the outstanding indebtedness of the high school district amounted to \$2,265,000, or 68 per cent of the total bonding capacity.

In comparison to other established unified districts throughout California this area proposed for unification would rank: eighteenth in terms of assessed valuation; above the median of \$10,486 of elementary schools in unified districts in terms of assessed valuation per pupil; above the state median of \$34,824 for other high schools in unified areas in terms of assessed valuation per unit of average daily attendance; below the state median of \$272.08.

for elementary schools in terms of current expenditure per unit of average daily attendance; above \$416.79, the state median of current expenditure per unit of average daily attendance on the high school level.

In addition to a complete educational program extending from kindergarten through the 12th grade, a good school system should offer specific educational services in order to provide a more equalized educational opportunity for all children. In this area proposed for unification, the following services provided by individual districts were found inadequate: library facilities, physician and nurse, kindergarten, supervisory assistance, auditory and visual equipment, classes for physically and mentally handicapped, vocational education, and transportation. It is to be noted, however, that these services were not totally lacking as districts could rely on the County Office of the Superintendent for assistance. It is the opinion of the investigator that these services could be provided more economically and thoroughly to all districts if they were controlled by a single administrative unit.

In order to attain an enrollment of 10,000 pupils, as recommended in the California Administrative Code, a period of approximately ten years would be needed. Therefore, community identity should be considered the deciding factor in terms of size of this area. Even with a total

enrollment of 6,476 pupils for the 1955-56 school year this area would rank twenty-fifth in terms of total average daily attendance with other unified districts in California.

Future attendance centers should be planned to eliminate those schools with enrollments less than 200 students and maintaining a staff of less than eight teachers if possible. A building program is progressing satisfactorily to ease the crowded facilities at the present high school site, which, in turn, will serve as a junior high school attendance center.

The area proposed for unification does include a clearly recognized area of community interest inasmuch as the people within the City of Lodi and the surrounding districts are homogeneous insofar as social, economic, and educational interests are concerned. The present Lodi Union High School District does firmly establish community boundaries.

It is the opinion of the investigator that one administrative unit could more efficiently and effectively coordinate the educational program of the 18 school districts involved in this study than the 18 administrative units that now exist. Five or seven trustee areas should be carefully planned to insure local control, flexibility, and community participation of the new district.

CHAPTER VI

FULFILLMENT OF STATE BOARD OBJECTIVES BY PROPOSED UNIFICATION

In order that each objective as adopted by the State Board of Education can be more clearly interpreted in regards to the findings of this study, each objective will be stated and discussed individually.

1. To produce a more effectively coordinated program of education for all levels of the State's public school system through strong local school district organization, with a single administrative control over all levels of public education in a given area.¹

As previously mentioned in Chapter V, only one school district, The Lodi Union Elementary School District, had any resemblance of a coordinated educational program extending from kindergarten through grade 12. In this district a superintendent is employed to govern the educational policy of five elementary schools and one high school. All of the other districts within the area have their own respective administrative units as well as a local board of trustees. Examination of Table V (page 58) revealed that 66 school board trustees governed the policies of 18 school districts.

¹State Board of Education, "Policies of the State Board of Education Regarding School District Organization," California Schools, XXIV, September, 1953.

Instead of the existing 17 administrative units and 66 school board trustees that now govern the educational program and policies of the 18 individual school districts, one administrative unit and five or seven trustees could more efficiently manage the educational affairs of this proposed unified area. Maximum educational returns could be realized if the educational program were well coordinated and well planned as a whole from kindergarten through at least the 12th grade.

Inasmuch as the proper definition of function of state and county and local district in the administration of schools depends on a sound, strong, local district organization, it is time to consider the two schools of thought regarding local control.

One school of thought holds that local control is strong when a district is small and an intimate relationship exists between the electorate and the board of trustees. It is assumed that the wishes of the people in regard to education can be translated quickly and effectively into educational action.

The opposing school holds such is not true, for there is little for the board of trustees of a small district to control. The laws under which the district must operate, the certification of teachers, acceptable textbooks, required training of pupils, and the partial financial support of education is controlled by the State. It is further pointed out that the special services required by the small districts such as general supervision, health and physical education services, audio-visual aids, financial services, school library services, coordination activities, and in case of many small districts, appointment of the board of trustee members, selection of teachers, preparation of the budget, and purchase of supplies are under the control of the county superintendent of schools, an official who in many counties

is elected by the voters in large districts, which use his services only to a limited extent.

This second group further points out that the small school districts are dependent on the County Board of Education for the development of a course of study for the pupils, and that strong local control occurs only when the people within a district directly controls all, or as many as feasible in a given area, of the educational services needed to provide a complete educational program. Strong local control is opposite to the situation where a district is dependent upon outside agencies such as the state or county to provide services.

A school district which parallels the complete natural community can participate more effectively in matters of common community concern, such as health service coordination, recreation programs, and use of community facilities, etc. . . .²

2. To provide a more efficient use of public funds, brought about by the creation of school districts capable of furnishing necessary educational services at a reasonable unit cost.³

It was noted in Chapter V that 17 of the 18 existing school districts included in this study depended to some extent upon the County Office of the Superintendent of finance such services as those listed in Table VI (pages 59-60). This financial assistance is derived from an apportionment of State funds⁴ to the county superintendent to

²How Can We Organize our Schools More Efficiently and Economically? The Governor's Conference (Sacramento: September 30 to October 1, 1955), pp. 12-13.

³"Policies of State Board of Education Regarding School District Organization," loc. cit.

⁴Education Code, Sections 9501-9595.

finance such services, generally for the benefit of small schools. It is recognized by educational authorities that greater local and state funds are necessary for the operation of small schools, particularly those with less than enrollments of 100 pupils. The financial problem of small, non-isolated, and unnecessary schools could be eliminated in this area through proper district organization by a single administration.

Considering the total assessed valuation per unit of average daily attendance of the proposed area as well as the proper location of attendance units of sufficient size, there is no reason why this district could not provide adequate and equalized services throughout the area. Furthermore, a more effective use of specialized personnel could also be achieved considering the size of the district and undivided control of services. Local and state funds now used to finance the cost of education in many small schools within this area could be used more efficiently in a larger district.

Economies in administrative costs, building costs, operational costs, transportation costs, state loans for buildings, state equalization funds, purchasing, and maintenance of schools could also be realized with proper district reorganization.

3. To provide a better and more equalized educational opportunity for all children in the State through the creation of school districts sufficient in size to be able to provide curricular offerings and other services not possible under existing organization.⁵

A more equalized, and in some cases better, educational opportunity could be offered to all students within this area through the creation of a single administrative unit to coordinate and plan as a whole from kindergarten through at least grade 12. Instead of inadequate services that now exist in many school districts (see Table VI) adequate services could be provided at all attendance units of sufficient size. Educational services controlled by one administration could be more effectively and equally coordinated throughout the entire proposed district instead of the divided administration of services that now exists between the county and the local districts.

4. To effect as great a degree of equalization of financial resources on the local level as circumstances will permit.⁶

In order to effect the greatest degree of equalization of financial resources on the local level it would be necessary for all districts to assume an equal share of

⁵"Policies of State Board of Education Regarding School District Organization," loc. cit.

⁶Ibid.

the educational costs. This would involve not only a uniform tax rate for all districts, aside from present indebtedness, but a willingness to bond the district if additional funds were needed for capital outlay. This realization of equal tax rates, excluding present indebtedness, throughout the entire area necessitated from one budget to provide local school support, would insure each district of paying an equal share. Any future bonded indebtedness could be spread over the entire area, whereupon, all districts would assume an equal share. Districts now paying excessive amounts for current expenditures would find consolation in the fact that these expenditures would be reduced and equalized throughout the entire area.

Districts of high assessed valuation per average daily attendance and usually with small enrollments naturally have the most to lose by unification; however, these large blocks of wealth cannot be separated from the children by a boundary line created before the turn of the century. Under the existing mode of operation, the responsibility which is primarily that of a community to provide adequate school-housing, is passed on to the people of the State as a whole. Examination of Tables I (page 51) and VII (pages 66-67-68), assessed valuation per unit of average daily attendance and report of capacity and condition of school buildings, further reveals that those districts exceeding the median

assessed valuation per unit of average daily attendance of \$14,500 are in most cases the same districts that have school buildings that should be abandoned or are in need of extensive repair.

I. SUMMARY

Upon examination of the four specific objectives in the program of developing school district reorganization, as adopted by the California State Board of Education, in contrast to existing conditions there can be little doubt that the reorganization of this proposed area would conform to these objectives.

Maximum educational returns and equalized opportunities could be realized if the educational program were well coordinated and well planned as a whole from kindergarten through at least the 12th grade. The entire educational program could be managed more efficiently and economically by one administrative unit and five or seven trustees instead of the present 17 administrative units and 66 school board trustees.

Strong local control would occur when the people within the district directly controlled all, or as many as feasible in a given area, of the educational services needed to provide a complete educational program. Strong local control is opposite to the situation where a district

is dependent upon outside agencies such as the state or county to provide services.

Considering the total assessed valuation of this area and the proper location of attendance units sufficient in size to offer adequate educational services, there is no doubt that this area could provide equalized services at a more reasonable cost. Services, which are now inadequate in many districts within the area, could be provided at attendance units of sufficient size to make these services feasible. Instead of divided control between the county and local school district that now exists, the educational opportunity could be more efficiently and economically managed by a single administrative unit. Public funds, both local and state, could be used more effectively for the larger unit or district.

Educational planning for a large area would do much to eliminate the financial problem of small, non-isolated, and unnecessary schools. The elimination or reduction of these unnecessary small schools through the creation of better district organization would provide a more equalized support of all districts of the State.

To effect the greatest degree of equalization of financial resources on the local level, it would be necessary for all districts to assume an equal share of the educational costs. This would involve not only a uniform

tax rate, excluding present bonded indebtedness, but a willingness to bond again, if necessary, for capital outlay expenditures. Current expenditures for the entire proposed area would also be shared equally by all of the districts.

Districts having large assessed valuations of wealth would perhaps have to finance a heavier share of the costs than they are presently doing; however, these districts cannot continue to separate themselves from the other districts having lower assessed valuations. Districts that have a large assessed valuation per unit of average daily attendance are often those which have inadequate school-housing or educational programs and could gain many benefits from unification.

CHAPTER VII

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

I. SUMMARY

Within the area studied three types of districts were found: thirteen elementary, four union elementary, and one union high school.

Sixty-one elementary and five high school trustees composed the governing boards of the 18 individual school districts within the area. In 16 school districts, excluding the Lodi Union Elementary and Union High School Districts, principals as well as trustees were found participating in the educational process of carrying on the work of an administrative nature more properly considered the work of a superintendent.

Assessed valuation varied from \$426,030 to \$26,837,105 among the 17 elementary districts for the 1955-56 school year. The total assessed valuation of the 17 elementary districts amounted to \$66,529,865 which would place the proposed unified district eighteenth in terms of total assessed valuation in comparison to other unified districts throughout the State. The more standard factor of comparative financial ability, the assessed valuation per unit of average daily attendance, ranged from \$7,746

to \$45,715 which presented a median of \$14,500. This median is considerably higher than the State median of \$10,486 for elementary schools in all unified districts. The assessed valuation per unit of average daily attendance in the high school amounted to \$39,909.93 as compared to the State median of \$34,824 for other high schools in unified areas.

Elementary tax rates ranged from \$.376 to \$1.748 while the combined elementary and high school tax rates varied from \$1.41 to \$2.782.

Great variations were found in current expenditures per unit of average daily attendance in the 17 elementary school districts. A range of \$196.98 to \$415.11 indicated the differences of local support to maintain an educational program. This presented a median of \$247.00 as compared to the State median of \$ 272.08. The high school current expenditure per unit of average daily attendance amounted to \$447.48 as compared to the State median of \$ 416.79.

The bonding capacity of the entire area may be considered adequate inasmuch as the outstanding indebtedness of the 17 elementary districts amounted to 46 per cent of the total bonding capacity while the high school indebtedness amounted to 68 per cent of the total bonding capacity. It was noted, however, that this high school indebtedness was for the construction of a new plant which will adequately serve the entire area for years to come.

Enrollment data indicates continued growth for the ensuing years. Using a mean growth of 323.22 units of average daily attendance per year, an additional ten years would be needed to reach an enrollment of 10,000 pupils. Community identity should be considered the deciding factor in terms of size of this area. With an enrollment of 6,476 units of average daily attendance for the 1955-56 school year the proposed district would rank twenty-fifth in terms of total average daily attendance with other unified districts in the State.

The following educational services provided by the individual elementary districts were found inadequate: library facilities, physician and nurse, kindergarten, supervisory assistance, auditory and visual equipment, classes for physically and mentally handicapped, vocational education, and transportation. It was noted, however, that these services were not totally lacking but were administered by a divided control between the Office of the County Superintendent and the local school district. Maximum educational services and opportunities could be realized if the educational program were coordinated and planned by a single administrative unit.

Schoolhousing varied from small frame buildings erected in another era to modern structures properly designed as schools. Ratings of elementary school buildings

indicated: eight buildings should be abandoned; seven buildings were in need of extensive repair; four buildings were considered good; and nine buildings were considered excellent. Three elementary school sites were found inadequate by accepted standards. The high school buildings, with some exceptions, were in need of repair or modernization and the utilization of these buildings was to the point of congestion. In addition, a site of only 14 acres constituted an impracticable situation. The future of the present high school upon completion of the new high school plant is that of a junior high school.

Nine elementary schools were found with enrollments less than 150 pupils. These small schools substantiated the recognized short-comings of small schools. Multiple grade situations and inadequate services and equipment existed. School districts with multiple grade situations represented 67 per cent of the total number of elementary schools.

The 17 elementary school districts comprising the Lodi Union High School District embody a community which is fairly homogeneous insofar as its social, economic, and educational interests are concerned. The City of Lodi forms the nucleus of this community. Transportation to and from Lodi make all parts of the proposed area easily accessible.

II. CONCLUSIONS

It is concluded from this study that the following conditions exist:

1. Lack of a single administration to coordinate and plan the educational program from kindergarten through at least the 12th grade.
2. Inequalities in educational opportunities and services.
3. Wide variations in the ability to support education.
4. Lack of strong local district organization and control.
5. Inefficient use of local and public funds.
6. Unnecessary attendance centers which could be eliminated or relocated because of insufficient enrollment or inadequate schoolhousing.
7. Sufficient bonding capacity.
8. Establishment of community identity.
9. Provision of adequate transportation.
10. Favorable comparison with other unified districts throughout the State.

III. RECOMMENDATIONS

Unification of the entire area, presently comprising the boundaries of the Lodi Union High School District, is the most ideal plan of reorganization based on data pre-

sented in this study. Unification of this area would fulfill the following objectives:

1. Equalize educational opportunities throughout the entire area.
2. Effect a coordinated program with single administrative control over all levels of education.
3. Provide a more efficient use of public funds.
4. Equalize the cost of education throughout the area.
5. Provide an adequate school building program.
6. Equalize the taxable wealth behind each child.
7. Equalize the financial resources of the entire area.
8. Provide efficient and economical pupil transportation.
9. Equalize tax rates throughout the area.
10. Provide maximum use of specialized personnel.

IV. FUTURE STUDIES

When a district becomes unified, or is about to become unified, there are certain problems which seem invariably to occur. These problems are offered here for future study of this proposed unified area. These studies would include:

1. Consideration as to the number of board members and the designating of trustees areas so as to provide competent board members who can represent the dis-

trict and not necessarily a particular faction within the district.

2. Proper location of attendance centers of adequate size. The question of the 8-4 or the 6-3-3 attendance center plan should also be considered as well as the closing of some of the small schools.
3. Services for pupils, schools, and staff must be determined. Supervision, records, attendance service, health service, and counseling must be changed and organized to the best advantage. The question of which services are to be provided by the district and which should be sought from the county office must be determined.
4. The coordination of transportation facilities, and possible expansion of service.
5. Adoption of board policies regarding the new district.
6. The number and assignment of staff members and arrangements for maximum utilization of those formerly employed by the component districts.
7. Consolidation and reorganization of business procedures, such as, budget preparation and control, accounting procedures, management, supply, and insurance needs.
8. Consideration to district-wide operation and

maintenance programs involving organization and coordination.

9. Consideration of public relations to encourage interest and understanding.

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