Social, Economic and Educational Trends Leading to the Merger of the Caldwell County and Lenoir Public School Systems

George S. Kirby
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SOCIAL, ECONOMIC AND EDUCATIONAL TRENDS LEADING TO THE MERGER OF THE CALDWELL COUNTY AND LENOIR PUBLIC SCHOOL SYSTEMS

A Dissertation
Presented to
the Faculty of the Department of Education
East Tennessee State University

In Partial Fulfillment
of the Requirements for the Degree
Doctor of Education

by
G. Steward Kirby
August 1975
APPROVAL

This is to certify that the Advanced Graduate Committee of

G. STEWARD KIRBY

met on the

15th day of July, 1975.

The committee read and examined his dissertation, supervised his
defense of it in an oral examination and decided to recommend that his
study be submitted to the Graduate Council and the Dean of the School
of Graduate Studies in partial fulfillment of the requirements for
the degree Doctor of Education.

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Chairman, Advanced Graduate Committee

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Dean, School of Graduate Studies
DEDICATION

Dedicated to Wanda.
ACKNOWLEDGMENTS

I wish to express my appreciation to the members of my Doctoral Committee, Dr. C. Harold Measel, Chairman, Dr. James H. Bowers, Dr. Floyd H. Edwards, Dr. William L. Evernden, and Dr. Herman A. Stribling.

In a final word, I must record my appreciation to my family. Wanda, Eric, Angela, and Rodney were supportive throughout the doctoral program. In moments of my frustration, they were able to smile.
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Chapter 1

INTRODUCTION

The public schools of the 1960's and early 1970's were confronted with pressures and complex problems never before encountered. The public demanded quality education, faculties demanded a voice in the school decision making process, and students were restless and militant. It was generally agreed that change in public education was a mandatory proposition. Citizens and professional educators recognized that although many changes had occurred in recent years, schools were still behind the times. Educators, employees, parents, and students were asking questions about the effectiveness of the public school system. Employers expected the schools to produce trained people capable of performing complex and sophisticated tasks in business and industry. Each year society became more demanding; thus, it was imperative that individuals who graduated from the nation's high schools be thoroughly prepared to assume a productive role in society.

Small school districts were finding it increasingly difficult to meet the demands of an industrialized and commercially oriented society. As a result, serious attention was being given to the merger of two or more administrative units to improve education. A basic consideration in merger was the increased financial resources made available. Frequently, a district with a broad financial base could merge with a smaller district and provide an adequate instructional program for all the students.
Adequate financing was only one of the numerous benefits claimed by advocates of school district merger. The development of a stronger instructional staff was an important consideration. It was possible for a larger unit to reduce teacher-pupil ratio and employ specialists in the various subject areas. Auxiliary service personnel could be provided by staff reorganization and staff time could be spent in the area of specialization.

Proponents of merger claimed that the merging of small school districts resulted in better planned and equipped schools. Planning could be done in such a manner that schools could be built and managed for highly efficient use of facilities, equipment, and personnel. Consequently, instruction would improve.

Most important, the curriculum in the public schools could be strengthened by consolidation and merger. The number and quality of course offerings in academic and vocational areas increased with the increase in enrollment. English, mathematics, science, and the social studies were available in small schools; however, art, music, and industrial arts were usually available only in larger schools. If public schools were to meet the interests and needs of students, then an improvement in the quality and number of courses available was also a necessity. Society demanded that the non-college bound student receive an adequate education as well as the potential college graduate.

THE PROBLEM

Statement of the Problem

The problem of this study was to identify and analyze the social, economic, and educational trends that led to the merger.
of the public school systems of Caldwell County and the city of Lenoir, North Carolina.

Significance of the Study

The study provided basic social, economic, and educational information on Caldwell County which led to the merger and could be utilized by other similar systems considering merger in North Carolina. The majority of adults in Caldwell County and Lenoir had been dissatisfied with the public schools for a number of years. The study was needed to identify the sources of discontent as well as mutual concerns in the two school systems. It was needed to determine why school systems merge. The study disclosed that competition between the two school districts for funding and public support has been reduced and that a common standard of instruction had been established. Furthermore, the study indicated that the goals of one school system can be better interpreted to the public, eliminating the need for school officials to explain and defend the differences between the Caldwell County and Lenoir school systems.

Problems created for the schools by the expansion of the city limits of Lenoir and the supplemental school tax levied in Lenoir were identified. The situation in the Lenoir schools resulting from racial integration, the shifting of population, and the increasing public demand for good instruction have been examined. The economic interdependence of Caldwell County and Lenoir were considered. The commercial and industrial complex of the county was based in the Lenoir area; however, the labor resided in the county. Tax rates, property evaluation, and employment of citizens was analyzed to discover trends which made school merger inevitable.
Advocates of merger claimed that the strengthening of public education in Caldwell County would result. They believed curricula would be expanded, while at the same time greater efficiency in school business could be realized. In their view, school accounting, staffing, and provision for instructional supplies and equipment would be enhanced. In the view of these advocates of merger, student personnel services, additional specialized personnel, and improved maintenance and plant operation would result from the merger of the two school systems.

The investigation was needed to assist the political leadership and the citizenry to comprehend the societal forces which dictated merger and the implications involved in public school mergers. The study was designed to determine why the event of merger occurred. Justification of merger was not the issue.

The study provided significant information to professional people and the public in school districts confronted with the prospects of a school district merger. Social, economic, and educational factors identified in Caldwell County and Lenoir may be studied for applicability elsewhere. The study indicated that there are common elements involved in school district mergers in North Carolina; however, important specifics differ. The study sought to discover the specifics in Caldwell County.

**DELIMITATIONS OF THE STUDY**

The limitations of this study were as follows:

1. The background research for the study was limited to a review of the literature related to the subject and interviews with selected individuals in the community.
2. A survey was conducted through questionnaires submitted to the superintendent, chairperson of the school board, and selected principals of each of the nineteen school systems in North Carolina that merged after July 1, 1960.

3. The study focused on the Caldwell County and Lenoir school systems; however, data from eighteen other merged systems in North Carolina were used to ascertain reasons for merger of school systems.

4. This study was limited to the identification and analysis of social, economic, and educational trends that led to the merger of the Caldwell County and city of Lenoir public school systems.

ASSUMPTIONS

The following assumptions were considered relevant:

1. The social, economic, and educational trends that led to the merger of the Caldwell County and Lenoir public school systems could be ascertained,

2. A survey of the literature would reveal similar social, economic, and educational trends throughout the nation, that contributed to public school system mergers.

3. Conclusions could be drawn that would project statewide significance relative to merger of school districts.

DEFINITIONS OF TERMS

Basic Administrative Unit

Local school districts are the basic administrative sub-divisions or units of the state which are responsible for the operation and maintenance of public school systems. Each is governed
by a board of education which is responsible for the operation of the public schools within the geographic area. ¹

Consolidation, County Unit

County unit consolidation consists of a merger of all school districts within a county so that boundaries of the consolidated district coincide with those of the county. ᴡ

Consolidation of Schools

Consolidation refers to the abandonment of one or more attendance units and the bringing together into a larger attendance unit. ³

District Reorganization

District reorganization refers to the legal reconstitution of the basic administrative units of a state. It is accomplished through the authorization of the state legislature and results in the merger and/or revision of former district lines. ᴄ

Merger

The act of becoming legally absorbed or extinguished, and combined into one. ᴅ As used in this study, the reference will be to school systems.


³Ibid. ᴄJarvis, Gentry, and Stephens, op. cit., p. 141.

PROCEDURES

Current periodical literature and various texts pertaining to the problem of the study were reviewed. The guides to *Current Index of Journals in Education* (CIJE), *Dissertation Abstracts* (DATRIX), *Education Research Information Center* (ERIC), and the *Education Index* as well as the library catalog were carefully studied. As deemed appropriate, all these sources were used to obtain material for inclusion in the study.

Questionnaires were sent to the superintendent, school board chairperson, and selected principals in all districts in North Carolina that merged between July 1, 1960 and July 1, 1974. The data collected were analyzed to determine commonality of reasons for merger. Any notable differences in the merger concept were duly noted. Trends, as stated in the problem statement, were sought from the questionnaire respondents.

The writer conducted interviews with various knowledgeable and influential citizens in the community. The purpose was to collect specific data and expert opinion related to the problem. Specific information dealing with local industrial income, population statistics of the city of Lenoir, zoning ordinances, and current pupil enrollment in the schools was gathered in this manner.

School board minutes of the Caldwell County and Lenoir Boards of Education were scrutinized for pertinent information.

When all available information had been analyzed, conclusions were drawn and implications determined pertaining to social, economic, and educational trends involved in public school mergers.
ORGANIZATION OF THE STUDY

Chapter 1 includes an introduction to the study, the statement of the problem, the significance of the study, delimitations of the study, assumptions, definitions of terms, general procedures to be followed, and the following divisions of the study.

Chapter 2 presents a review of related literature and research.

Chapter 3 contains procedures and methodology used in collecting and analyzing.

Chapters 4, 5 and 6 present an analysis and evaluation of the social, economic, and educational findings of the study.

Chapter 7 contains the summary and conclusions of the study,
Chapter 2

REVIEW OF THE LITERATURE

INTRODUCTION

During the 1900's, the merger of small school districts was a trend in the United States. School boards faced with new demands from the public were forced to modify school organization, curricula, and related services. Awareness of many social, economic, and educational variables led school board members to realize the necessity for involvement of community groups in the decisions affecting the future of public education. This awareness helped educators to realistically assess the needs of public school students. Meeting these needs effectively and efficiently demanded even more, however. Small, inadequate school districts unable to meet their responsibilities found merger a means of providing comprehensive programs capable of dealing with increased demands on public education.

BASIC FACTORS IN MERGER

Widely varying practices existed in various states and school districts regarding methods of school funding. Primarily because of this fact, no one could determine the exact factors necessary for an adequate economic base. However, there were some factors upon which educators generally agreed. Obviously local economic conditions in a school district were one important determinant. Others included the
tax structure, the public awareness of educational needs, and the public's desire and determination to provide a means for adequate school funding.

The financial implications of school district merger or reorganization had to be carefully noted. Educational leaders and the public needed to realize that the purpose of merger is to improve educational programs and equalize educational opportunities for all students. To accomplish these objectives, the financial aspects of merger had to be considered. The public was especially sensitive to cost, and merger was not necessarily less expensive. The public had to be supportive of merger or reorganization.

Most states willingly assisted local districts in reorganizing. Assistance was available in one of three forms. The more common means of encouraging merger was to assist in transportation. The state allocated increased funding for transportation in cash or by the purchase of buses. Frequently, this removed a major obstacle to merger. A second means of encouraging reorganization was through the tax structure. State legislatures authorized local districts to levy lower tax rates than was normally required to receive equalization grants. The lower tax rate had a tendency to lower public resistance to change. Third, the state provided funds for capital outlay. Since construction frequently accompanied merger, this incentive often was decisive.¹

Frank A. Bucci stated that school district consolidation can solve financial problems, equalize opportunities, and improve education. While admitting that people are tired of increased taxes and bond issues, he pointed out that good schools are a necessity. He suggested that the merger of small school districts can provide a solution. By the merger of two or more small districts, per-capita cost could be expected to decrease and the quality of educational service to increase. Many districts suffered from duplication of effort, uneconomical use of facilities and personnel, and general failure to derive maximum use from available community resources.\(^2\)

Bucci further contended that most districts attribute their troubles to insufficient tax monies, too narrow a tax base, unequal tax assessment, and other public service costs. Whatever the cause, inadequate education programs have economic implications beyond the present. Educationally deprived students today become economically deprived adults tomorrow.\(^3\)

There were some negative factors school administrators and board members needed to understand in implementing a plan of school system merger. The specific factors or reasons for resistance to school reorganization varied in different states and communities.

Generally, the reasons were summarized as follows:

1. Local control of schools would be lost.

2. The school plant would be taken out of the neighborhood and pupils transported too far away from home.


\(^3\)Ibid.
3. Frequently, a vested interest existed in the schools by organizations or individuals. Merger would terminate this personal or financial interest.

4. There was a fear by parents that their influence on their children would be weakened.

5. There was a fear of tax increases.

6. The level of instructional service may decrease.

7. The close relationship between the home and the school which had been maintained in smaller communities would be destroyed.

8. The community itself would be seriously weakened by the loss of the school.

SOCIAL CONTEXT

Society in the United States is highly organized. The twentieth-century American finds himself born into an organization, educated in an organization, and most citizens spend their lives as members of various organizations.

Amitai Etzioni noted that today's society places a premium on efficiency, effectiveness, and rationality; therefore, civilization depends on organizations as the most rational and competent means of sustaining group relationships. The organization became a tool for implementing action. The organization enabled personnel to command resources, to bring together experts, workers, machines, and raw materials to create a cohesive social influence. As the organizational

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system became more sophisticated, evaluation and adjustment were required to achieve designated goals. Therefore, organizational structure was inherently receptive and adaptive to change which, in turn, served well the individual needs of those in that organizational structure. Consequently, the economic and social needs of society were more adequately met and the larger society was more efficiently served through organizations than through smaller social and family groupings, each operating independently of the other. The citizen conceded that the benefits derived from the system did exceed the various pressures and frustrations often experienced in organizational membership.\(^5\)

Etzioni further stated that an organization is a social unit constructed to achieve specific goals. It might be a temporary unit or a permanent unit with immediate or long-range goals, though structure differed. The organization could be a military unit, a religious body, a business corporation, or a public school system. However, all organizations shared several characteristics. There was a division of labor and a hierarchy of responsibility and power designed to better attain goals. The success of individuals and the purposes of the organization underwent constant evaluation. Unsatisfactory performance of people in any organization could result in the transfer of personnel, their removal, and the promotion of other individuals.\(^6\)

For too long educators misunderstood the educational implications of societal organizations. Individuals in the education profession


\(^6\)Ibid., p. 3.
needed to understand and deal with social mobility of Americans, growth of science and technology, political awareness of minority groups, and demand for performance in public education. This cognizance and response was necessary in order for public education to provide expanded curricula and modern facilities to help meet the complex needs of a changing society.7

SOCIAL FACTORS

The district school has been as much a weapon for advance of the frontier as the blockhouse, the rifle, canoe, and Conestoga wagon. American education has consistently moved in the direction of public tax support, separation of church and state, a functional curricula and opportunity for all.8

In the early days of public education the town comprised the unit of local school administration. The district system was introduced early in our history to separate municipal administration from school administration. This was the beginning of a system that eventually resulted in the development of some 145,000 school districts throughout the United States.9

Gradually, more and more schools outgrew their one-room, one-teacher, and one-method-for-all procedures. The process of social change was the impetus to modify "the three R's curriculum" to today's expanded instructional program in modern facilities. Meeting the complex needs of a rapidly changing society was a challenge for both educators and the public. The world had to be

7Ibid., p. 105.
9Ibid.
brought into well-equipped and well-managed classrooms to provide students with meaningful educational experiences. Good libraries, laboratories, audio-visuals, and good books to enrich learning had to be accessible in the schools. Such improvements and changes in school organization and curriculum, mandated by social mobility, could realistically aid our nation's youth to be productive in a rapidly changing world.  

However, small schools and small school districts with limited resources could not provide these things. Reorganization seemed to be a means to accomplish better and more comprehensive educational services than those which existed. On the other hand, there were numerous social factors to be considered to bring about necessary changes in education.

The educational program could not be considered in isolation while contemplating reorganization and merger. The distance students needed to travel necessitated consideration. Such elements as topography, climatic conditions, highway systems, population density, and economic development of the communities affected had to be weighed in reaching decisions. Oscar T. Jarvis stated that school district lines should be drawn to conform to some identifiable community. However, he conceded that community means different things to different people; but whether village, town, neighborhood, or a larger political division, the community should conform to a "natural sociological area." That is, districts should include a population which shared somewhat common economic, social and cultural interests.

\[10\text{Ibid.} \quad 11\text{Jarvis, Gentry, and Stephens, op. cit., p. 160.}\]
Stephen J. Knezevich raised some perplexing questions in regard to the community and the community school. He pointed out that using a school for a variety of social activities does not make a community school. In his view, the school curriculum must be related to the resources and needs of a group of people before it became, in fact, a community school.\textsuperscript{12}

Cities

Knezevich pointed out that huge urban areas are having difficulty with the community school concept. Some people advocated sub-dividing and fragmenting of urban school districts as a means to return to the neighborhood school. Minority groups increasingly demanded to be heard. Blacks, in particular, viewed the school as representing the values of other social classes. The question has yet to be resolved.\textsuperscript{13}

Large metropolitan areas have experienced complex problems in their attempts to reorganize school districts. Millions flocked to the cities for decades following the industrial revolution. Since 1960, however, the trend has reversed. Numerous cities experienced a net loss in population between 1960 and 1970. Concomitant with this, cities encountered a change in racial composition which forced them to make social and economic adjustments in their school district structures.

According to Robert J. Havighurst, between 1951 and 1959, the people in the central part of the city grew poorer, while people in the suburbs grew richer. The central city became populated by a socially


\textsuperscript{13}Ibid.
lower class while the suburbs became middle class. It appeared that this situation had implications for school district reorganization.\textsuperscript{14}

To many citizens, the single school system in the central cities appeared cumbersome, bureaucratic, and impersonal. In the future, they might find it necessary to break the large city district into several smaller autonomous districts. Each of these districts could contain one or more high schools and numerous neighborhood elementary schools. Such a reorganization would permit a student population of twenty to forty thousand. Therefore, a city of one million people would have five to ten school districts. Some plan of reorganization coupled with the rehabilitation of the central city should assist education. Smaller systems could eliminate the bureaucratic outlook of professional educators and could restore some feeling of local responsibility to the public.\textsuperscript{15}

\textbf{Rural Areas}

Numerous writers in economics, education, and sociology noted the impact of technology on public education. These complex forces together affected rural life as well as urban life. Concurrent with mechanization on the farm, improvement in transportation and communication changed rural community life. Highways were surfaced and, particularly in the South, farm-to-market roads were priority items in state budgets. Thus, the automobile, bus, and truck were


easily accommodated. Rural dwellers commuted thirty to fifty miles to work in the city, and city inhabitants, in turn, moved to the suburbs. The difference between living standards and customs of urban and rural people became minimized.

Rural electrification in the 1930's had an enormous influence in bringing citizens together. Electricity enabled farm and household conveniences to become a part of rural life. The radio, television, and newspaper became as common in rural America as in metropolitan areas.

Ronald F. Campbell and others reported that all of these forces and the resultant movement of people affect schools and school district reorganization. As cities and the suburbs grew, fewer people resided in the country. As a result rural dwellers frequently found reorganization of local districts essential to provide adequate educational programs. The situation was found to be especially acute at the high school level. Large scale reorganization would not have been feasible without bus transportation, but good roads helped provide a solution to this part of the problem. In rural areas, county school units, the most common type of rural school organization, found consolidation and merger the most practical way of implementing school district reorganization to provide sound educational programs.

With the improvement of transportation arteries in the Mid-west and South, with rising educational costs, and with public demands for better schools, small local schools became less and less practical. Therefore, reorganization began in the early twentieth century.

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16 Ibid., p. 131. 17 Ibid., p. 132.
One-teacher schools were consolidated to provide elementary schools of one to two hundred students and high schools of fifty to one hundred pupils. Even in the most sparsely populated areas, Campbell recommended that the total number of students per district be at least two thousand. But he indicated that this small number could support only one high school where limited programs would be available; gifted and slow learners would have limited opportunity, and vocational programs would be restricted. An excellent program in college preparatory work and technical curricula would not be practical. On the other hand, a minimum of ten thousand students was considered desirable for any district to provide an adequate program in all areas.  

School Oriented Groups

Numerous organized groups exerted an influence on education. Campbell reported on a study by Floyd Hunter which found the National Congress of Parents and Teachers to be one of the more powerful groups in education. Hunter discovered some 1,093 local and state organizations which sought to influence education, and considered the Parent Teachers Association most influential at the local level. The American Association of School Administrators and National School Boards Association were recognized as influential at the national level. In more recent years numerous Community Action Programs became powerful in representing the poor and minority groups.  

Educators conscious of the implications of such organized group involvement solicited their support for good comprehensive programs.

18 Ibid.
19 Ibid., p. 327.
J. Minor Gwynn and John C. Chase believed that basic groups participating directly and indirectly in the educative process help make education more comprehensive than that attained only through the skills, attitudes, and knowledge learned in the schools. They stated that (1) the family, (2) the church, (3) the play group, (4) economic agencies, (5) non-commercial community and social agencies, (6) leisure time activities, and (7) the federal government exert influence upon youth in different ways with great force. Therefore, all these factors have influenced the movement toward merger of inadequate school districts.  

Curriculum Expectations

Different social groups placed different values on curriculum content. According to a survey by Jacob W. Getzels and others, the upper, upper middle, and middle class preferred an intellectually oriented curriculum. This concept of education was found more pronounced at the secondary level where those social classes placed a secondary emphasis on socially oriented studies. They tended to minimize the vocational aspects of education.

Conversely, the lower and lower middle classes considered the social aspects of education paramount, followed by vocational training. The traditionally intellectual curriculum received less consideration. From these findings recorded by Getzels and others, the potential conflict between social classes revolves around the classical curriculum versus the vocational curriculum.  


SOCIAL IMPLICATIONS OF REORGANIZATION

Reorganization frequently created different socio-economic settings for the school. Older communities and leaders lost their influence as younger leaders emerged. Groups usually realigned themselves and different organizations emerged to develop new and broader goals. Leadership in the new setting required knowledge of the social structure, including the reorganized component groups and their leaders. The superintendent's role concept needed to change. He found that he needed to become a group spokesman, harmonizer, and the symbol of group ideals. Herein lay an opportunity for the alert superintendent. With the social structure in a state of flux receptive to reorganization, he could emerge the leader. By organizing advisory committees he could redirect the educational thrust. Cohesiveness could be developed, and by a systematic effort adult education and leadership could be developed in the redefined social structure.

The superintendent and school board members must sense the change and be ready for it. Experienced administrators have discovered that the new district can no longer revolve around the small community. A reorganized school district must develop unity of purpose in which diverse groups are brought together to achieve educational and social equality previously nonexistent. The power structure will change. Different racial, social, and religious groups will become a part of the new power structure. Leadership can bring people with different customs and habits together. Authorities found that it takes time
for the new structure to meld, but that unity of purpose can become a reality.\footnote{22}

LEGAL BASIS OF PUBLIC EDUCATION

There was a firm legal basis for public education in the United States. By 1820, thirteen of the twenty-three states in existence had constitutional provisions relating to public education. In Massachusetts in 1852, and as recent as 1918 in Mississippi, the various states have enacted compulsory education laws. Alaska and Hawaii have similar legal provisions in support of public education.\footnote{23} An example is illustrated from the constitutional provision of Illinois. "The general assembly shall provide a thorough and efficient system of free schools, whereby all children of this state may receive a good common school education."\footnote{24}

When school district reorganization came under consideration, all legal procedures necessary for accomplishment had to be followed. Variations in procedure varied among the states; however, reorganization was possible in all states. School officials could supply legislatures with the latest professional knowledge and could make recommendations for action. It was necessary for professional leadership to be aware of how legislation came into existence.

Jarvis and others outlined three basic types of legislation. The most prompt method of getting results was mandatory legislation. 

\footnote{22}{School Administration in Newly Reorganized Districts, op. cit., p. 52.}
\footnote{23}{Campbell and others, op. cit., p. 10.}
\footnote{24}{Ibid.}
In this method, the state legislature reorganized the districts without a vote of the people. The legislature might act directly or delegate its decision making powers to a state or a county agency. Permissive legislation was an enactment which allowed school district reorganization, but action was left to the voters of the districts. The third method of reorganization was called semi-permissive. In this method, the state required specific procedures for reorganization, but the approval of the people was required for reorganization to occur.\(^{25}\)

Edgar L. Morphet listed numerous characteristics of desirable school district reorganization legislation. He stated that on the basis of studies made in various states, certain criteria can be used in preparing laws relative to district reorganization. These were as follows:

1. Legislation relating to district reorganization should be kept as simple as possible and should make it easy for districts to effect desirable reorganization.

2. All state laws should be reviewed to determine their effect on district reorganization and those which encourage the continuance of inadequate districts or retard needed reorganization should be revised.

3. The reorganization law should provide that all reorganization proposals are to be based on careful studies and planning before being voted upon.

4. The law or regulations of the state board of education should define basic criteria or minimum standards to be used for guidance in planning reorganization of districts.

5. The laws should specifically define the responsibility of the state and local reorganization commissions and of all groups and persons officially involved in the reorganization program.

6. In all states with a large number of small districts the law should provide for a state reorganization commission.

\(^{25}\) Jarvis, Gentry, and Stephens, loc. cit.
7. In states with numerous small districts the law should authorize local commissions on reorganization.

8. The law should provide for a maximum number of people working cooperatively for effective district reorganization.

9. The law should provide that if some separate elementary and secondary districts are inadequate, the taxpayers of those districts would bear the extra expense involved in providing adequate school services and facilities for the children of the district.26

EDUCATIONAL TRENDS

It was the thesis of this study that school reorganization and merger will enhance educational opportunity. This involved curriculum changes in a program of merger and consolidation. Charles F. Faber discussed the following contingencies relevant to effective school reorganization and merger. The size of the reorganized school district should be determined on the basis of programs and educational services that can be provided. Consideration should be given to the desirable size for elementary and secondary schools and the instructional program envisioned. Each school district should be able to provide quality educational programs from kindergarten through grade twelve. In addition, adults should be able to pursue their interests and increase skills in various programs. Writers agreed that the scope and quality of public schools must meet the demands of a complex society. There should be programs for the academically superior student and remedial programs for the underachievers. There should be provisions for assisting students with special needs. Faber further stated that the district must be able to offer a comprehensive program of elementary

and secondary education, including kindergarten and junior college in which educational guidance and counseling services would be available.\(^\text{27}\)

**CURRICULUM**

The modern curriculum changed from the traditional academic program to a more comprehensive one because of the numerous economic and social factors which influenced it. Increased leisure time created by shorter working hours and more years in school compelled public schools to broaden their offerings. Merger of school districts enabled school systems to meet these responsibilities. This is especially true in curricula designed to provide training in the constructive use of leisure time and training in the areas of homemaking and vocational skills.\(^\text{28}\)

Gwynn stated that the school cannot exist in a vacuum but must operate in conjunction with the home, church, and all other agencies of the community that influence the development of young people. He believed that the primary task of educators is to use the curriculum to help students accommodate themselves to the economic and sociological factors with which they must deal. Teachers, administrators, and curriculum designers must comprehend the role of the family, church, gang, and other socio-economic units.\(^\text{29}\)


\(^{29}\)Gwynn and Chase, op. cit., p. 98.
In recent years public education has evolved to emphasize the need for certain specialists. This came about through the provision of diversified curricula and auxiliary personnel. Specialists in diagnostic reading, speech, and language development became common. Instructional materials centers and data processing systems currently in use by public school systems created additional special personnel needs. 

According to William Van Til, many educators, especially college professors, participated in curriculum change. However, a realistic view compelled one to accept the fact that the motivation for change usually comes from societal forces. A significant social change generated demand for educational change; hence, the schools changed.

The history of education provided numerous examples of social problems being referred to the schools for solution. In the 1930's and 1940's, the economic and social conditions brought about school involvement in vocational and technical courses. In the 1950's, the public schools reacted to the fear of Russian dominance. Consequently, there were strengthened programs in mathematics, science, and modern languages to make the United States competitive with Russia's advancements in space explorations. In the latter 1960's and early 1970's, a public awareness of poverty nagged the national conscience, and the schools again reacted by shifting emphasis to the black and disadvantaged student. Angry youth, the disenchanted blacks, and the drug culture brought about curriculum innovations. Free-choice curricula, black studies, problem-centered courses, drug abuse information, and the rise

\[30\] Knezevich, op. cit., p. 152.
in crime had their impact upon curriculum construction. The public was forced to take a hard look at the schools. Reorganization was one of the results.

SCHOOL ORGANIZATION

As merger of school systems occurred, there were changes in the instructional organization and professional leadership of the public schools. Changes in the composition of the student body, increase in the enrollment of individual schools, and diversified curricula each exercised some influence. The following are some organizational plans and practices which might be more effectively implemented by reorganized school districts than by small districts.

Professional Leadership

Frequently, reorganization demanded more and better educational leadership. Sufficient teachers, administrators, and supervisory services were difficult to acquire in poor and sparsely settled areas. An unlimited supply of instructional, supervisory, and administrative leadership was not available. It was accepted that good leadership required intensive academic and professional preparation as well as experience. The caliber of people, desired by contemporary educational professionals, possessed insight, energy, dedication, and the ability to get results from the educational enterprise. Such individuals were needed and wanted by good school systems. Roe L. Johns and Edgar L. Morphet believed there would never be enough qualified

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professionals to go around, and the merger of small systems efficiently utilizes professionally competent leadership.\textsuperscript{32}

**Nongraded Schools**

The nongraded concept was an innovation of the last decade. Its aim was to individualize instruction and eliminate instruction by grade level. A typical nongraded organization in the primary school might include students who normally enrolled in first, second, and third grades. These children received instruction at their achievement level with little consideration for age. Larger schools, possible through merger, were able to include such innovations in their curricula.\textsuperscript{33}

**Team Teaching**

J. Lloyd Trump was considered a leading proponent of team teaching. This teaching method applied to an arrangement in which two or more teachers plan, instruct, and evaluate students as a team. Each teacher instructed in her particular area of competency. The total number of students assigned to a team equaled two to three conventional classes. Conventional techniques of instruction were combined with a variety of instructional aids, large and small group discussion, and independent study.\textsuperscript{34}


\textsuperscript{33}Ibid., p. 463.

\textsuperscript{34}Ibid.
Core Curriculum

The interrelationship of knowledge was stressed in the core curriculum. The arbitrary division of subject matter was discarded, and students dealt directly with human problems and utilized different sources of information. In a secondary school two or three periods were scheduled "core" or "common learnings."

Modular Scheduling

Modular organization was the adapting of time slots to anticipated need rather than the traditional fifty-five minute period. It might be considerably less or more than the usual class period. Course structure, the number of students involved, individual teacher or team assignments, and the school plant were some of the determining factors in modular scheduling.

Independent Study

At one time independent study was a means of using unscheduled student time in a constructive manner. It currently has a more inclusive meaning. Students might complete regularly assigned work or more typically be engaged in a special project or research concerned with the students' special interests.

Open Schools

The concept of open schools included three dimensions--space, organization, and curriculum. The organization previously mentioned have all influenced "openness." The emphasis was on freedom in

\[35\text{Ibid.}\] \[36\text{Ibid., p. 466.}\] \[37\text{Ibid.}\]
thought and movement as opposed to traditional authoritarianism. As to space, walls were movable, and in some cases internal partitions were virtually non-existent.38

**Alternative Schools**

John Brewer popularized this concept with the Parkway program in Philadelphia. He stated, "there is no schoolhouse, no separate buildings, school is not a place but an activity, a process." Usually the alternative school involved small group experiences; and students alternated basic skill study with field experiences in museums, service stations, and other work experience.39

**SPECIAL PROGRAMS**

All citizens needed assurance of opportunity consistent with their needs. Equality did not mean the same educational program for everyone. It did mean, however, that each citizen had opportunity to develop, in accordance with his needs, to his potential. Of course, the cost to society was greater for some citizens than for others because of the variance of needs.

In many high schools academic programs, or college preparatory courses have received major emphasis because they were the prestige programs. Such emphasis was not consistent with the needs of many students. Although the cost will be increased in the immediate future, the provision for vocational-technical courses in public schools might avoid greater long-range cost to society.

38Ibid., p. 470.
39Ibid., p. 471.
Educable Mentally Retarded

Public schools have provided classes for retarded students. Teachers were certified in various types of special education. The organization of special education programs varied among the individual states, but the acceptance of this responsibility by the state has been clearly established.  

Early Childhood

In the decade of the seventies, early childhood curriculum offerings expanded and became available to more and more citizens. Early childhood education became recognized as increasing in importance. Psychologists and sociologists agreed with educators that the early environment is crucial in providing the foundations for the future development of children. States have assumed the responsibility for providing for the development of early childhood and kindergarten education programs for all children.  

Adult and Continuing Education

Research indicated that adult and continuing education received state funding support. The emerging needs of a changing and technological society have mandated retraining and more formal education for adult citizens. Research demonstrated that there had been too few opportunities for the lower income groups and that most citizens required training for a change in vocations. Curriculum planners and administrators could no longer afford to neglect this area of

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41 Johns and Morphet, op. cit., p. 10.
education. In conjunction with the needs of modern society, adults like children deserved a wide range of educational opportunity. Johns and Morphet maintained that unless these opportunities are provided, society will pay dearly for shortsighted policies.\footnote{42}

ACHIEVEMENT

It has been assumed that academic achievement as measured by standardized tests is useful in evaluating the merits of district reorganization. As early as 1930, attention was given to achievement in schools of different size. H. W. McIntosh and H. E. Schrammel reported on a study in rural Kansas. Tests were prepared by the Bureau of Educational Measurement of Kansas State Teachers College. Students were divided into Division A schools, which were nine-month graded schools in villages and cities, and Division B schools, which were eight-month rural schools. The students took the same objective tests in the subject areas of arithmetic, civics, history, English, reading, and spelling. The total possible score was 328 points. Division A students had a median score of 198.7, and Division B students scored 186.7. Further analyses indicated that the mean scores in every subject area was higher for students from the Division A schools.\footnote{43}

William H. Drier reported on another study designed to determine what difference, if any, existed between the achievement of rural

\footnote{42}Ibid.

children in graded and ungraded (one-teacher) schools. Tests were administered in reading, language, spelling, and arithmetic in grades six, nine, and twelve. He found no significant difference at the sixth-grade level. However, in the higher grades the mean scores favored the graded school pupils.  

DeForest Hamilton and Robert N. Rowe reported on a study which verified that students in larger districts achieved more than those from small districts. Communities were paired on the basis of non-reorganized and reorganized school districts. First-grade pupils were tested; and subsequent tests were administered during the sixth, ninth, and twelfth grades. First-grade pupils in the non-reorganized school districts scored higher. Nevertheless, students in reorganized districts improved at a faster pace; and the final results indicated that boys and girls from reorganized school districts were superior academically by the time they completed school.  

Kreitlow gave a detailed report on the same study in 1967. At that time the original sample of seven hundred students had been reduced to three hundred in grade twelve because of migration in the original sample. He stated that the opportunities for educational development of students as measured by such items as library books, teaching aids, and special teachers in art and music were significantly greater in reorganized districts. He further stated that more attention  

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45 DeForest Hamilton and Robert N. Rowe, "Academic Achievement of Students in Reorganized and Non-reorganized Districts," *Phil Delta Kappan*, XXXIII (June, 1962), 401-404.
should be given to personal and social development of students in the reorganized districts.

The superiority of students in the reorganized districts on a number of intellectual, social-personal, and participation variables is pictorially presented on pages 35 and 36.

Clarence Pound and John Young quoted numerous studies that support the educational advantages of reorganization. According to their study of the research there was evidence that school size determines grouping practices and curricula offerings, especially in music, arts and crafts, science, and foreign language. They quoted a study by William Woodham, who found that course offerings increased rapidly up to an enrollment of 450 students in the high school. Beyond 450 students the number of courses continued to increase, but the rate of increase became less pronounced. In another study, twenty-three high schools were consolidated into nine. Superior programs of studies resulted after reorganization. This was indicated by improved school plants, lengthened school terms, decreases in teacher turnover, and decreases in the number of emergency teaching certificates. In-service training for teachers increased, and more teachers were teaching in their area of specialty. 46

Charles Weaver found that the alternate scheduling of courses decreased as the size of the school increased. He also stated that larger high schools had more special teachers in such areas as home economics, industrial arts, agriculture, art, music, and physical

46 Clarence Pound and John Young, "Reorganized School Districts Provide Increased Educational Opportunities," The Teachers College Journal, XXXIX (May, 1958), 94-96.
Numbers at the top of each bar indicate the number of measures on which that group exceeded the group with which it was matched. Numbers at top of graph indicate the total number of achievement measures at each grade level.

Chart 1

Achievement Differences Between Boys and Girls in Reorganized and Nonreorganized Schools in Grades 1, 6, 9, and 12

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Table 1

Months of Mental Ages for the Same Boys and Girls in Reorganized and Nonreorganized Schools in Grades 1, 6, 9, and 12

<table>
<thead>
<tr>
<th></th>
<th>Grade 1</th>
<th>Grade 6</th>
<th>Grade 9</th>
<th>Grade 12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boys—Reorganized</td>
<td>87.5</td>
<td>147.3</td>
<td>184.1</td>
<td>229.7</td>
</tr>
<tr>
<td>--Nonreorganized</td>
<td>86.2</td>
<td>145.2</td>
<td>182.3</td>
<td>223.2</td>
</tr>
<tr>
<td>--Difference in Months</td>
<td>1.3</td>
<td>2.1</td>
<td>1.8</td>
<td>6.5</td>
</tr>
<tr>
<td>Girls—Reorganized</td>
<td>88.1</td>
<td>155.0</td>
<td>194.7</td>
<td>240.3</td>
</tr>
<tr>
<td>--Nonreorganized</td>
<td>87.6</td>
<td>154.5</td>
<td>188.6</td>
<td>227.2</td>
</tr>
<tr>
<td>--Difference in Months</td>
<td>.5</td>
<td>.5</td>
<td>6.1</td>
<td>13.1</td>
</tr>
</tbody>
</table>

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48 Ibid.
education. It seemed that the availability of special teachers was an indication of the quality of the instructional program.\textsuperscript{49}

Some of the educational factors which influence achievement, and which must be confronted when considering merger, were as follows:

1. Is the school system securing and holding high quality teachers?

2. Is the school system employing high caliber administrative and supervisory leadership who hold the respect and confidence of pupils and teachers in the community and keep the educational program in tune with the times?

3. Is the school system constructing and equipping the kind of buildings that pupils and teachers need to do effective work?

4. Is the school system making efficient use of equipment, personnel, and financial resources of the school district?

5. Is the school system providing the educational opportunities that meet the interests, needs, and abilities of all pupils; that encourages the weakest to do their best; and that stimulate and challenge the strongest until he develops his full potential powers?

6. Is the school system giving parents an opportunity to work to good advantage in helping to plan and direct the educational program.\textsuperscript{50}

FINANCE

The persistent question in public education has always been, "How much should education cost?" People knew that learning could occur any time and under unusual circumstances even though it might be haphazard, unorganized, or scientifically scheduled. In any event, it involved time, a degree of effort, and financial support in some


\textsuperscript{50} School Administration in Newly Reorganized School Districts, op. cit., p. 10.
form. The public has to make the ultimate decision on the cost of education, which involves a decision in regard to quantity and quality of education. Johns and Morphet explicitly stated the situation:

The financial provisions for education establish the limits within which schools and educational institutions must operate; they also determine whether or not certain kinds of decisions may be made about the quantity and quality of education to be provided.\(^{51}\)

In the United States everyone with tax-paying ability is required to assist in the funding of public education. Inequities among the states and in school districts can be documented. Because of the tax structure, citizens in areas with less financial resources paid proportionally more to support schools than did taxpayers in more prosperous communities.\(^{52}\)

Expanding instructional programs and the increased cost of education became a reason for reorganization. Reorganization could provide a stronger tax base and better use of tax money by purchasing more educational service for each dollar. This did not mean however, that reorganization always proved less expensive. However, the possibility of more efficient use of tax monies could be offered to the public in the hope that merger would be supported.

If reorganization means additional service in support of the instructional program, for the same expenditure of money, and if the school program is utilized more effectively, a legitimate argument can be made for reorganization. If reorganization of school districts

\(^{51}\) Johns and Morphet, op. cit., p. 18.

\(^{52}\) Ibid., p. 14.
provided a broader tax base and the elimination of tax inequities, then another strong case is made. If it could be shown that school plants are used to capacity and overcrowded classrooms relieved, the public can be convinced of the wisdom of merger and reorganization.\footnote{School Administration in Newly Reorganized School Districts, op. cit., p. 17.}

Financial Support

The solution to the problem of how to provide adequate financial support for public schools was difficult, involved, and perplexing to the professionals as well as to the public. Nevertheless, if instruction were to be improved and cultural deprivation in America reduced, additional funding was required. However, financial resources always constituted a problem because money for education could mean the curtailment of other public services such as police and fire service, roads, and health service. The community needed to visualize the school as a vital service meeting community value standards in order to make the commitment to provide adequate funding.\footnote{Getzels, Lipham and Campbell, op. cit., p. 338.}

The local district was primarily responsible for providing the financial support for public schools. State and federal support had recently increased, but the local population still provided the major source of funding. According to a study by Hansen in 1963, in terms of national averages, local taxes provided 56 percent of school funds; state taxes, 40 percent; and federal support, 4 percent.\footnote{Hansen, op. cit., p. 50.}
A more recent study compiled by the National Education Association provided the information graphically illustrated in Table 2.

From the time the earliest public schools were established until the present, states delegated increased fiscal responsibility to the local level. At first the legislation was permissive, but later districts were compelled to finance the schools. Some states in the early 1970's placed legislative restrictions on local taxation policies. For example, no district could raise money in violation of state laws. Furthermore, states placed a specific limitation on the amount of local taxes that could be raised, the amount of bonded indebtedness, and, in instances, determined how the money could be spent.\textsuperscript{56}

One possible solution to the problem of school finance is for the state to supply a greater share of the funds, placing less emphasis on local monies. In the meantime, if local districts are to be basically responsible for funding schools, they have three alternatives.

1. Impose a higher tax rate.

2. Broaden the tax base by taxing more property of more people, including a local sales tax.

3. Increase the assessed valuation of local property by increasing the rate of assessment or increase the wealth by developing resources.\textsuperscript{57}

\textsuperscript{56}Ibid.

\textsuperscript{57}Ibid., p. 58.
Table 2

Distribution of Total Revenue Receipts for Public Elementary and Secondary Schools, 1962-63 through 1972-73

<table>
<thead>
<tr>
<th>School Year</th>
<th>Federal Sources</th>
<th>State Sources</th>
<th>Local and Other Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1962-63</td>
<td>3.6</td>
<td>39.3</td>
<td>57.1</td>
</tr>
<tr>
<td>1963-64</td>
<td>4.4</td>
<td>39.2</td>
<td>56.4</td>
</tr>
<tr>
<td>1964-65</td>
<td>3.8</td>
<td>39.7</td>
<td>56.5</td>
</tr>
<tr>
<td>1965-66</td>
<td>7.9</td>
<td>39.1</td>
<td>53.0</td>
</tr>
<tr>
<td>1966-67</td>
<td>7.9</td>
<td>39.1</td>
<td>53.0</td>
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<tr>
<td>1967-68</td>
<td>8.8</td>
<td>38.5</td>
<td>52.7</td>
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<tr>
<td>1968-69</td>
<td>7.4</td>
<td>40.0</td>
<td>52.6</td>
</tr>
<tr>
<td>1969-70</td>
<td>8.0</td>
<td>39.9</td>
<td>52.1</td>
</tr>
<tr>
<td>1970-71</td>
<td>7.2</td>
<td>40.0</td>
<td>52.8</td>
</tr>
<tr>
<td>1971-72</td>
<td>8.0</td>
<td>40.2</td>
<td>51.8</td>
</tr>
<tr>
<td>1972-73</td>
<td>7.8</td>
<td>41.0</td>
<td>51.2</td>
</tr>
</tbody>
</table>

58 Van Til, op. cit., p. 257.
Another means of relieving the financial burden is the reorganization of school districts. Larger districts will broaden the tax base to help equalize taxable wealth. Usually, the existence of rich and poor districts side by side is a geographic accident rather than a logical districting. Hansen gave four suggestions for equalizing the financial abilities of school districts.

1. Reorganize and combine many of the small districts to give a sound basis for school taxation.

2. Raise the assessed valuation within each state to a realistic level.

3. Place more of the educational burden on the state level—the state will distribute funds more evenly.

4. Enact a broader base for federal taxation in support of schools. This would tend to equalize the educational burden and opportunities among the states.59

Van Til gave recent figures regarding the sources of tax receipts in the United States today. At the local level, property produced the largest tax revenue; following property taxes in importance were sales taxes. These taxes were levied on retail outlets and varied among the states. Such products as gasoline, cigarettes, and liquor were generally taxed more heavily than foods. The third largest source of taxes, which was becoming more important, was individual and corporate income taxes.

The following table presents the information regarding sources of income spent on taxes in 1968.

The inequity that existed among the states in expenditures per pupil illustrates the inequity in educational opportunity. States differ in wealth as do districts within a state. For example, in

59Ibid., p. 59.
Table 3
Percentages of Income Spent on Taxes by Homeowners, 1968-69

<table>
<thead>
<tr>
<th>Income (Family of Three)</th>
<th>$3,000</th>
<th>$5,000</th>
<th>$7,000</th>
<th>$9,000</th>
<th>$13,000</th>
<th>$20,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Tax</td>
<td>7.2</td>
<td>4.0</td>
<td>3.1</td>
<td>2.9</td>
<td>2.8</td>
<td>2.2</td>
</tr>
<tr>
<td>Sales Tax</td>
<td>2.9</td>
<td>2.4</td>
<td>2.1</td>
<td>1.9</td>
<td>1.6</td>
<td>1.4</td>
</tr>
<tr>
<td>Federal Income Tax</td>
<td>3.2</td>
<td>8.0</td>
<td>10.7</td>
<td>12.1</td>
<td>14.0</td>
<td>18.0</td>
</tr>
<tr>
<td>Total</td>
<td>13.3</td>
<td>14.4</td>
<td>15.9</td>
<td>16.9</td>
<td>18.4</td>
<td>21.6</td>
</tr>
</tbody>
</table>

1972-73 Alabama spent $590 for each pupil in average daily attendance. At the same time New York spent $1,584 and Alaska, $1,473.

The inequity of expenditures is illustrated in the following table.

Federal Taxes

In 1971, 82 percent of federal tax revenue came from individual income taxes, corporate income taxes, and employment taxes. The balance came from trust funds, estate and gift taxes, customs duties, and miscellaneous receipts. 61

Theoretically all citizens were taxed equally from the standpoint of ability to pay; specifically no group should be favored in the tax structure. The progressive tax, supported by most economists, provided that the tax should be prorated according to the amount of income of the individual or corporation. There were two primary

60 Ibid., p. 265. 61 Ibid., p. 259.
Table 4
Current (1972-1973) Expenditure per Pupil in Average Daily Attendance for Elementary and Secondary Day Schools

<table>
<thead>
<tr>
<th>Amount</th>
<th>Number of States (and D. C.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 550-599</td>
<td>1</td>
</tr>
<tr>
<td>600-649</td>
<td>0</td>
</tr>
<tr>
<td>650-699</td>
<td>3</td>
</tr>
<tr>
<td>700-749</td>
<td>5</td>
</tr>
<tr>
<td>750-799</td>
<td>3</td>
</tr>
<tr>
<td>800-849</td>
<td>4</td>
</tr>
<tr>
<td>850-899</td>
<td>4</td>
</tr>
<tr>
<td>900-949</td>
<td>8</td>
</tr>
<tr>
<td>950-999</td>
<td>2</td>
</tr>
<tr>
<td>1,000-1,049</td>
<td>4</td>
</tr>
<tr>
<td>1,050-1,099</td>
<td>1</td>
</tr>
<tr>
<td>1,100-1,149</td>
<td>6</td>
</tr>
<tr>
<td>1,150-and over</td>
<td>10</td>
</tr>
</tbody>
</table>

reasons for this concept. First, taxes should not deprive the poor of a minimum standard of living. Thus, a differential rate based on personal income can be justified. Secondly, taxes on the extremely wealthy can aid in reducing the inequality in disposable income.63

CAPITAL OUTLAY

The provision of capital outlay funds has required long-range planning and serious attention to tax resources. In this regard, inadequate school districts impeded the development of a sound plan for capital outlay. If the state or county provided funds to all districts regardless of size, there is little incentive for district reorganization to take place. Thus, the inadequately financed

district is able to perpetuate itself because new construction would take place regardless of the economic and educational logic involved.

There was a trend in a few states to withhold capital outlay funds from school districts below a specified student enrollment. These funds were held by the state but became available when two or more inadequate districts merged to meet the state recommendations. In the meantime, the money was utilized by other districts on a short-term loan basis. However, seen as drastic action by some people, such a policy might become necessary in states with a large number of small districts. The fact that capital outlay funds were made available on demand usually facilitated resourceful planning and led to school district reorganization.  

Research by Arvid Burke has shown that small districts tended to be educationally inadequate. They did not provide a broad curriculum nor were they economically satisfactory. Yet in most instances, reorganization was a slow process. The local tax structure and state aid enabled the system to perpetuate itself but did not allow for program improvements. Therefore, legislative action and the tax structure required attention for significant improvement to occur.

SUMMARY

A review of the literature has indicated that reorganization of school districts is more than a combination of small schools. Improved instruction and a diversified curriculum should result.

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64 Johns and Morphet, op. cit., p. 399.
The research of related literature has presented evidence that this can be expected. The curriculum should be sufficient in quality and quantity and comprehensive in scope to educate people to perform complex tasks. Skill and competence were demanded in American society. The reorganization of inadequate school districts was one means society can utilize to assist education in attaining its goals.

The literature relating to the financial base of public education was specific in citing evidence that spending has increased and that the tax base of support had to be broadened. This could be attributed to four primary reasons: (1) increased enrollments, longer school terms, and a decrease in student drop-out rates; (2) improvement in educational programs and standards; (3) changes in prices and the purchasing power of the dollar and (4) rising living standards of the population. 66

Funding at the state level had to be changed if structural reorganization of districts was to occur. Equalization support had to be available for capital outlay and transportation, if students were to be transported and rehoused. The local district had been taxed to the limit.

Educational writers stated that the public demand for the extension of the public school to include the kindergarten and public community colleges made increased funding a necessity. Adult education was believed to be an integral part of the education system as political, social, and economic problems became more complex.

66 Ibid., p. 526.
Chapter 3

PROCEDURES AND METHODOLOGY

INTRODUCTION

The task of this study was to identify and analyze social, economic, and educational trends in Caldwell County, North Carolina, that led to the merger of the Caldwell County and Lenoir public school systems.

PROCEDURES

The following procedures were employed:

1. Computer searches of related literature were made by ERIC, DATRIX AND CIJE.

2. Related literature and research were reviewed.

3. Permission was requested and received from the chairperson of the Caldwell County Board of Education to read the board minutes as they pertained to the merger discussions.

4. Selected political, civic, and industrial leaders in the community were interviewed to solicit their views on the merger and their perception of the reasons for the merger.

5. Questionnaires were mailed to the superintendent, school board chairperson, and selected principals of school systems in North Carolina which have merged since July 1, 1960. Results were tabulated and summarized.
6. A table depicting the consolidation of schools in Caldwell County since 1930 was prepared.

7. The latest census information available was studied in regard to employment, income, and education of Caldwell County residents.

8. Demographic data significant to the Caldwell County-Lenoir area was presented in Chapters 4 and 5.

9. The State Department of Public Instruction provided information pertaining to the merger of school systems in North Carolina.

10. Events leading to the merger, as reported in the Lenoir-News Topic, Lenoir, North Carolina were reviewed.

Computer Searches

Computer searches were made by Educational Research Information Center, Dissertation Abstracts and School Research Information Service.

Related Literature and Research

A review of literature and research pertaining to the merger of public school systems was conducted and summarized in Chapter 2.

The review was executed by the following procedures. The latest issues of educational periodicals and various reference books were scrutinized for information relative to the study. The guide to ERIC, DATRIX, SRIS, Current Index to Journals in Education and the card catalog were searched. As pertinent information was reviewed, notes were taken for inclusion in the study. These notes were categorized according to social, economic, and educational implications in the literature reviewed.
School Board Minutes

The writer reviewed the minutes of the Caldwell County and Lenoir Boards of Education for the years, 1969-70 through 1973-74, and extracted information relative to the merger. Such a review provided specific information and insight into progress of the merger discussions.

Consolidation

A table depicting the consolidation of schools in Caldwell County and Lenoir since 1930 was prepared. This technique illustrated the movement toward fewer attendance districts and schools. The table includes the number of schools in operation, the number of students enrolled in each school, and the number of teachers and principals employed. The statistics were prepared at ten year intervals: 1930, 1940, 1950, 1960, 1970, and 1974.

Interviews

Sixteen prominent citizens in Caldwell County were questioned by means of a structured interview guide to obtain their views regarding the merger of the Caldwell County and Lenoir school systems. In selecting the people to be interviewed, the reputational technique was utilized. The idea for the method of selecting the individuals was secured from the work of Floyd Hunter\(^1\) dealing with community power structure. Rowena Bowers used the method in a study pertaining to the

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power structure in Johnson City, Tennessee.\(^2\) The technique, however, was modified to meet the purposes of this study.

The author, a native of the area, prepared a list of twenty people who, in his view, had a reputation for possessing influence in the community. All of these twenty people were active in the civic, political, or business affairs of the area. Fifteen people in Caldwell County were then asked to list five persons whom they considered influential in the decision making process in the county. All fifteen people responded with a list of five individuals. In each case the list of five was cross-referenced with the other lists and the names listed by this writer, to determine the frequency of individual names. Only thirty-five names emerged, indicating relatively few people in positions of power in Caldwell County. Of the thirty-five names listed, sixteen appeared on the various lists from two to eight times each. Those sixteen people were chosen for interviews.

A close examination of the influential people disclosed that six were prominent in the industrial community. Four of those six were employed by a single company. One was employed in Lenoir's largest bank and one was a retired owner of a textile manufacturing company. Three were employed in professional education. Three individuals were active in the political life of the area. One black man active in the minority rights movement, and one woman active in business, political, and civic affairs completed the listing. Only two of the individuals were not natives of the area.

Prior to the interviews, appointments were made with each individual, and the purpose of the interview stated. A structured interview was carefully planned to guide the conversation in order to obtain the desired information. Notes were taken during the conversation and compiled immediately after each interview. Information and views pertaining to social, economic, and educational trends in Caldwell County were priority items.

Census Data

The official 1970 census was used to obtain social, economic, and educational data about Caldwell County and Lenoir. In addition, officers of the Lenoir-Caldwell Chamber of Commerce and personnel directors in local industry were contacted to solicit information pertinent to the study. Such items as number of employees, average wages paid, and educational skills required for employment were requested.

Questionnaire

Questionnaires were prepared and mailed to superintendents, board chairpersons, and forty-two senior high school principals in the nineteen school systems that had merged in North Carolina since July 1, 1960 (see Appendix A). The questionnaire (see Appendix B and G) adapted from one used by Cole\(^3\) in 1971, was designed to solicit information of social, economic, and educational significance in

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school system mergers. Prior to finalization, the questionnaire was critiqued by five classes of graduate students in educational administration at East Tennessee State University, Johnson City, Tennessee. Such a testing procedure resulted in improvement in vocabulary and structure of the questionnaire.

Sixteen of the superintendents (84 percent) returned the questionnaire. Fourteen of the chairpersons (74 percent) returned the questionnaire. The principals returned twenty-seven (64 percent) of the questionnaires.

The returns were analyzed for common elements and trends relative to the study.

State Department of Public Instruction

Letters were sent to the State Department of Public Instruction, Raleigh, North Carolina. Such information as the legal authorization for merger, the various means of attaining school merger in North Carolina, and the view of the people in the Department of Public Instruction with regard to local conditions favoring merger were solicited. As specific information pertaining to the Caldwell County-Lenoir merger became available, it was incorporated into the study.

Local News

Copies of the local newspaper, the Lenoir-News Topic, were gleaned for relevant items relating to the merger of the school systems. Articles from July, 1968 through June 30, 1974 were reviewed. This procedure enabled the writer to comprehend community response to the prospect of merger.
SUMMARY

Chapter 3 provided a description of the procedures and methodology employed in the study. When the procedures were completed, the material was assimilated, analyzed, and presented in Chapters 4, 5, and 6. Chapter 7 consists of a summary and conclusions.

The study involved computer searches, a review of related literature, a study of school board minutes, interviews with local influential citizens, a study of census data, the sending of questionnaires to merged school systems in North Carolina, contact with the Department of Public Instruction, a review of merger events as reported in the Lenoir-News Topic, and a summary and conclusions.
Chapter 4

SOCIAL AND POPULATION FACTORS

INTRODUCTION

In looking at the merger of the Caldwell County and Lenoir public school systems, social and population factors had to be considered. Therefore, a premise of the study was that a description of the existing social and population situation was in order.

DEMOGRAPHIC DATA

Caldwell County is located in the western foothills of North Carolina. One can observe from a map that the demarcation line separating the mountain and piedmont areas of the state passes through Caldwell County. The county as a legal entity was formed in 1841, and consisted of 476 square miles.

The county had four incorporated cities in 1974. Lenoir was the largest city and the seat of county government. This study indicated that the power base, both political and economic, was located in the Lenoir area. The other incorporated towns were Hudson, in the geographic center of the county, and Granite Falls and Rhodhiss in the southern portion of the county. In 1974, Lenoir was the only municipality to maintain a separate school system.
The total population distribution, according to the 1970 census, is presented in the following table. It indicates that the county has consistently grown in population.

Table 5
Population Data of Caldwell County

<table>
<thead>
<tr>
<th></th>
<th>1950</th>
<th>1960</th>
<th>1970</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lenoir</td>
<td>5,092</td>
<td>10,257</td>
<td>14,705</td>
</tr>
<tr>
<td>Hudson</td>
<td>922</td>
<td>1,536</td>
<td>2,533</td>
</tr>
<tr>
<td>Granite Falls</td>
<td>2,286</td>
<td>2,644</td>
<td>2,388</td>
</tr>
<tr>
<td>Caldwell County</td>
<td>43,352</td>
<td>49,552</td>
<td>56,699</td>
</tr>
</tbody>
</table>

Races 1970

<table>
<thead>
<tr>
<th></th>
<th>White</th>
<th>Nonwhite</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>52,950=93.38%</td>
<td>3,749=6.62%</td>
</tr>
</tbody>
</table>

Urban Population (Lenoir) 14,705
Rural Population 41,994
Male 27,639
Female 29,060
Households 16,833 3.3 persons per household

The following graph presents the population growth since 1930 and a projection of growth through 1990. Assuming the projection to be reasonably correct, the county is destined for continued growth. Therefore all public services must expand and become more efficient.

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Figure 1

Caldwell County Population Projections
1980 and 1990

in their operation. The merger of the school systems is but one example of an attempt to provide better service as economically as possible.

According to a 1970 study by Traffic and Planning Associates, there were 12,980 occupied dwelling units in Caldwell County; 72 percent of this total, or 9,344 units were owner occupied and only 28 percent renter occupied. In the city of Lenoir 63.4 percent were owner occupied. Throughout the entire county 94.7 percent of the owner occupied housing was owned by whites. Thus, 5.3 percent of the housing was owned by non-whites. Such a housing pattern, 72 percent owner occupied, established the permanence of the population and a consequent interest in the public schools.\(^3\)

In 1969 and 1972, Lenoir expanded its city limits. The annexation took in three county schools: Valmead Elementary, Whitnel Elementary and Lower Creek Elementary. In 1963 (see Appendix E), legislation was passed to make the Lenoir city limits and the Lenoir School Administrative Unit coincide; however, in 1969, the legislation was repealed. Thus, the city of Lenoir extended its area to include county school areas, but the schools remained in the county administrative system.

In the last decade, population in downtown Lenoir declined as people constructed homes outside the former city limits. There was reason to believe that this trend would continue. Generally, demographers contended that the rural non-farm population in the United States would increase at a faster rate than the population of

\(^3\text{Ibid., p. 34.}\)
urban centers during the 1970's. There was a consensus that this trend would continue in Lenoir and Caldwell County. Young families would continue to move outside the city to rear their children.

In addition to the economic expense of building in the city, there were sociological advantages to living in rural areas. Some of the inducements were the absence of air pollution, less traffic, and a lower rate of crime. Totally, these factors provided for attractive living conditions.

Mentioned above were some of the social and population factors leading to merger. As Lenoir expanded and acquired more territory, the school situation had to be considered. The city and county schools became inseparable.

SOCIAL ANALYSIS

Questionnaire items classified as social in context were numbers 15, 17, 18, and 21. In the interview numbers 2, 4, 5, 8, 11, and 13 were considered social in nature.

Racial Situation in Lenoir Schools

Fourteen of the sixteen individuals interviewed stated that the racial mix in the Lenoir school system was paramount in the merger discussions. Although approximately 30 percent of the students in Lenoir were black, the problems of race and racial balance in the Lenoir schools was one of numerous factors discussed regarding merger. The most frequently cited racially related problem was the alleged increase in discipline problems, with a consequent decline in academic progress of students in the biracial Lenoir schools.
Decline in Enrollment

The decline in enrollment was cited as a reason for merger. Total enrollment decreased by approximately one thousand students in the Lenoir city schools since integration in 1965. While the number of blacks in the city system remained fairly constant, their percentage increased because of white students leaving the schools. Black residential areas did not change; however, numerous white families moved to areas outside the Lenoir Administrative Units.

Housing Patterns

Housing patterns in Lenoir were listed as a factor in the merger. Due to zoning laws, there was little space for new housing in the city. It was apparent that most new home construction was occurring in the county. Three interviewees responding to question 13 in the interview guide noted that young couples, planning ahead for children, were building homes near county schools.

Power Structure

In reference to question 8, seven (44 percent) of the people interviewed stated that "the power structure" wanted merger. The power structure in Caldwell County, interviewees were referring to, included business, commercial, and industrial interests which exerted political pressure. Closer questioning revealed that the county commissioners, and the Lenoir and Caldwell County Boards of Education were also included in the power structure. Two of the seven people candidly stated that the commissioners and board of education were tools of the industrial interests in the county.
Impact of School Surveys

Two major surveys of the Caldwell County schools and Lenoir public schools had been made prior to July 1, 1974. The Division of Surveys and Field Services of George Peabody College for Teachers, Nashville, Tennessee and the Division of School Planning, North Carolina Department of Public Instruction conducted these studies. Both surveys contained detailed analyses of school plants, instructional programs, and professional personnel. Both groups recommended merger of the two systems. Publicity by the local news media of these recommendations and numerous public meetings held to discuss merger were believed to have prepared the public to accept merger.

Expansion of City Limits

The annexation by the city of areas around Lenoir was given as a reason for merger. As reported elsewhere in this study, the Lenoir school district and the city limits were not coterminous. Thus, the Lenoir school district continued to lose students. Annexation caused some residents of the county to become a part of the city; however, they did not identify with Lenoir. Three elementary schools in the annexed area continued to operate as county schools.

Federal Courts and Department of Health, Education and Welfare

Five board chairmen and three superintendents from merged districts reported that increasing pressure from federal courts and the Department of Health, Education and Welfare encouraged merger. These officials cited efforts to establish racial balance and equal opportunity for all students as major factors behind this pressure.
In their opinion, eventual merger was inevitable. They had supported merger to avoid a court decision to insure racial balance and further polarization of the black and white communities. One superintendent stated that merger had reduced competition and improved relations between alienated communities.

School Sociology

Six principals noted that merger had improved the social mix in their schools. It was stated that racial integration was no longer a significant problem. Furthermore, comprehensive high schools helped black and white students from poor cultural backgrounds to improve their situation. One principal believed that artificial boundaries which tend to create class distinctions had been reduced.

SUMMARY

Respondents recognized that social considerations were instrumental in the implementation of school system mergers. The accommodation of racial integration and the establishment of racial balance were foremost among these social factors. Respondents also noted that the shifting of the white population and consequent expansion of city limits was influential in expediting the move toward merger.

In systems which had been merged for several years, the improvement in relations between former competing communities was pointed out. Principals, in particular, believed that the enlargement of the social base of students after merger was beneficial to youth.

Other improved social conditions listed were: (1) disadvantaged students could better overcome culturally deficient backgrounds;
(2) class distinctions were minimized; (3) political and public support for schools increased; (4) pupil and teacher morale improved and (5) teacher loyalty to the administration improved.
Chapter 5

ECONOMIC FACTORS IN MERGER

INTRODUCTION

The premise of this study was that merger of the educational systems of Caldwell County and Lenoir did not occur by coincidence. To the contrary, there was the assumption that numerous social, economic, and educational factors contributed to the merger and that these factors could be identified. As the study progressed, the need for a sound economic system and financial base emerged as essential factors to help provide an adequate educational program for all students. Therefore, a discussion of the economic background of the area seemed pertinent to the study.

Information in Chapters 4, 5, and 6 was compiled from the questionnaire (see Appendix B) mailed to superintendents, school board chairpersons and selected principals from all merged districts in North Carolina; interviews (see Appendix C) with community influential; school board minutes; the Lenoir-News Topic, and from social and economic statistics secured from local sources.

Industry

Since World War II, Caldwell County has moved from a basically agricultural economy to an industrialized economy. The major industry was wood furniture manufacturing and related industries which employed more than ten thousand people in 1974. Some of the other industries in the county included textiles, paper products, and a piano plant.
Those industries employed an additional four thousand people. The total labor force was employed in eighty-eight manufacturing plants, and consisted of more than twenty-five thousand people.¹

The average weekly industrial income in Caldwell County in 1974 was $130.00 compared to $140.00 for North Carolina. The median annual income in Caldwell County was $7,955.00 while the mean was $8,435.00.²

The foremost companies in the county in 1974, from the standpoint of number of employees and amount of payroll, were Broyhill Industries, Singer Corporation, and Bernhardt Industries. These companies were located in the Lenoir area. In the Granite Falls area Shuford Mills and Burlington Industries were the major employers.³

Agriculture

Income from agriculture continued to contribute to the economy of Caldwell County. In 1974, over seven hundred farmers earned 60 percent or more of their income from agriculture. Part-time farmers numbered two thousand. These were defined as people who earned 40 percent or less of their income from farming. The average farm size was 102 acres and the average farm investment was $200,000.00 for full time farmers and $60,000.00 for part-time farmers.

³ Ibid., p. 13.
Income from field crops, livestock, poultry and forestry products amounted to thirteen million dollars in 1974. Income from tobacco was listed separately and totaled approximately six hundred thousand dollars.\(^4\)

The mean farm self-employment income in the county, according to the 1970 census was $3,664.00.\(^5\)

**Taxes**

The tax rate in Caldwell County in 1974 was ninety cents per hundred dollar valuation based on an assessment ratio of 100 percent. The assessed property value was $317,400,866.00. The total bonded indebtedness was $4,673,000.00. During the same year Lenoir had a tax rate of $1.47 per hundred dollar valuation with a total bonded indebtedness of $4,710,000.00. The tax rate in Lenoir included the thirty cents school tax which has since been removed.\(^6\) The average county tax paid by individuals in the county was $76.23 in 1974, and the average paid by business was $596.66.\(^7\) (see Appendix D)

Caldwell County had a Double A credit rating as classified by Moodys and Standard and Poor in 1974. Thus, the county was in good financial condition to assume additional bonded indebtedness.\(^8\)

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\(^4\) Statement by Agriculture Extension Chairman, personal interview, March 5, 1975.

\(^5\) U. S. Census, op. cit., p. 2.

\(^6\) Blue Ridge Electric Membership Corporation, op. cit., p. 16.

\(^7\) Caldwell County Managers, Comparative Tax Statistics & Comments (Caldwell County: n. p., 1974).

\(^8\) Statement by Caldwell County Manager, personal interview, February 10, 1975.
ECONOMIC ANALYSIS OF THE STUDY

The questions classified as economic in the instrument mailed to superintendents, board chairmen, and principals were numbers 1, 2, 7, 9, 11, 12, 14, 16, and 20. In the structured interview, questions 3, 7, 9, 14, and 16 had economic implications. The economic factors in the study have been extracted and are presented below.

Stronger Financial Support

Nine of the sixteen people interviewed (56 percent) perceived merger as eventually increasing the financial support for schools. They generally conceded that there might be an immediate loss in support for the reorganized school district due to community friction and disenchantment during the process of merger; however, after the merger had been in effect for a few years, they surmised that public confidence and financial support would return as people observed improvement in the schools. Interviewees reasoned that the public would be willing to tax itself, once a sound educational program had been established and its quality demonstrated.

The respondents to the questionnaire supported the opinion of the interviewees (see Appendix B, #12). Seventy-five percent of the principals, 88 percent of the superintendents, and 79 percent of the chairmen either strongly agreed or agreed that financial support for schools had not been reduced since merger.

Tax Rate

Eleven people (69 percent) of those interviewed, thought that taxes would increase as a result of the merger. They stated that taxes
would increase in the entire county, although in their view, one of the reasons for merger in Lenoir was the supplemental tax for schools. Prior to merger, thirty cents of the $1,47 tax rate in Lenoir was allocated to the schools. These interviewees contended that the citizens of Lenoir saw merger as a way to rid themselves of this supplemental tax. Although there was no statistical data to support the belief that there was a relationship between merger and the repeal of the supplemental tax, the tax was removed when merger became a reality.

Merger and Efficiency

The majority of interviewees and respondents thought that merger would reduce per unit cost of services and increase the efficiency of operation. Fifteen of the interviewees (see Appendix B, #16) viewed merger as a means of increasing operational efficiency. All the superintendents who answered the questionnaire, 81 percent of the principals, and 71 percent of the board chairmen thought efficiency had increased since merger.

Industrialization in Caldwell County

Eighty-one percent of the interviewees or thirteen of the sixteen held the opinion that the growth of industry in the county had influenced the trend toward merger (see Appendix C, #13). They cited several reasons for this conclusion. The reason most frequently mentioned was that industry was interested in better educated employees, particularly as potential administrators in industry. However, 19 percent took issue with this conclusion. They contended that industry did not desire an educated employee. Another reason suggested as
encouraging the merger was that the relatively good economic conditions in the county raised the expectations of the people and good schools were considered as essential factor in raising standards of living. Also since the mid-sixties, men in management positions had migrated to Caldwell County and become influential in focusing attention on the schools.

**Economic Conditions**

In reference to question 14 in the interview guide, five of the interviewees thought that economic conditions were conducive to merger. In 1974, employment was high and furniture plants were operating at full capacity. The county had a relatively low tax rate and the county was in good condition from the standpoint of bonded indebtedness. Therefore, the people and the leadership were receptive to change, even though the reorganization might cost more.

**Central Administration**

One of the most common reasons given for merger was the advantage of one school administration. Both interviewees and respondents commented that the practice of employing two superintendents, each with a staff of professionals, meant personnel duplication and waste. Generally, people believed that one superintendent could function better than two and that a competent staff could be assembled with less personnel than the two independent systems required.

**Merger Trends in Other Services**

School merger was cited as only one example of cities and counties merging services. Increased attention was being given to the possible merger of other services such as law enforcement, fire
protection, and water systems. Two of the interviewees and four of the respondents to the questionnaire believed the merger of these services under one local county governmental system would eventually become a reality. Question 12 on the interview guide and question 21 on the questionnaire elicited the above responses.

**Salary Supplements**

Pertinent to a discussion of merger of the Caldwell County-Lenoir schools was the question of local salary supplements to state teachers' pay scales. In 1973-74, teachers in Lenoir received a $350.00 supplement each year and the county teachers received a $200.00 annual supplement. Merger was seen as a means of equalizing the salary supplement from local funds. Seven of the people interviewed (44 percent) item 15 on the interview guide, noted the need to equalize teacher salary supplements as a reason for merger.

**Maintenance of Schools**

Maintenance of the schools was a concern of the people of Caldwell County. Interviewees thought that merger would alleviate this problem. In their view, merger would enable the system to employ skilled people for maintenance work and facilitate long-range planning of the maintenance function.

Many of the questionnaire respondents stated that a capable administrator on the superintendent's staff should have exclusive responsibility for buildings and grounds. Specifically, nine and eleven of the principals either strongly agreed or agreed that centralized maintenance responsibility in a merged system would contribute to greater operational efficiency; all of the superintendents
strongly agreed or agreed, and eleven of the school board chairmen
strongly agreed or agreed that centralized maintenance was an advantage
of merger.

Existing Facilities

Merger was seen as a means to better utilization of existing
school buildings. In the 1960's and 70's, Lenoir had experienced a
loss of students and consequently, had empty classrooms. Because of
the consolidation of three high schools in the county in 1966, and the
transfer of high school students to one high school, there were empty
classrooms in several elementary schools. Merger was seen as causing
the redistricting of attendance areas with better use made of available
space. Five of the interviewees noted the existence of vacant
classrooms, though this was not a specific question asked in the
interview guide.

County Commissioners

Sixty-seven percent of the principals, 75 percent of the
superintendents, and 86 percent of the board chairmen stated that
merger had improved the relationship between the board of education
and the county commissioners. The primary reason given for this was
the fact that only one board of education was making requests for school
funding. Another reason frequently given was the business community's
approach to school business. Respondents stated that commissioners
were business men who were tax conscious; consequently, they appreciated
good management practices by the school board and administration.
Real Estate Interests

Two interviewees believed the real estate interests supported merger. They believed that eventually zoning laws in the county would be in the interest of real estate brokers; therefore, industrial, business and housing patterns would affect plans for new school construction. These two interviewees thought that even though real estate brokers took no official position their influence was effective.

SUMMARY

Numerous economic factors involved in the implementation of the merger of the Caldwell County-Lenoir public schools were enumerated. Potential financial support, lower tax rates, and administrative efficiency were viewed as most important. The ability of the merged district to plan more effectively for long-range school plant construction was seen by interviewees as particularly significant in Caldwell County. Interviewees and respondents stated that the elimination of district competition for local financial support from the county commissioners was an important factor to consider in merger of school systems.

Some of the other frequently mentioned reasons for and benefits from merger included the equalization of resources available, central purchasing, the operation of a central bus garage and one school maintenance crew.

Economic factors which were listed at least one time were the equalization of teacher salary supplements, the decreasing efficiency of the Lenoir unit, investment capital moving outside the city, and the fact that better utilization could be made of existing facilities.
Chapter 6

EDUCATIONAL FACTORS

Prior to the merger, July 1, 1974, two school systems operated within the boundaries of Caldwell County; the Caldwell County Public School System and the Lenoir School District. Each had its own board of education and superintendent. Each was funded jointly by the county commissioners and by the State Department of Public Instruction.

The Lenoir system consisted of:

<table>
<thead>
<tr>
<th>(1973-74)</th>
<th>Membership</th>
<th>Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lenoir Senior High - Grades 10-12</td>
<td>456</td>
<td>28</td>
</tr>
<tr>
<td>Lenoir Junior High - Grades 7-9</td>
<td>282</td>
<td>17</td>
</tr>
<tr>
<td>Davenport Elementary - Grades 4-6</td>
<td>261</td>
<td>14</td>
</tr>
<tr>
<td>East Harper Elementary - Grades 1-3</td>
<td>285</td>
<td>16</td>
</tr>
<tr>
<td>West Lenoir Elementary - Grades 1-6</td>
<td>357</td>
<td>16(^1)</td>
</tr>
</tbody>
</table>

The enrollment in the Lenoir schools in 1960-61 was 2,659 students. Enrollment had decreased to 1,641 in 1973-74, the year prior to merger.\(^2\)

---


The county schools were organized by school districts as illustrated below. The district high school is listed first, followed by the schools whose graduates attended that high school.

<table>
<thead>
<tr>
<th>(1973-74)</th>
<th>Pupils</th>
<th>Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Granite Falls High</td>
<td>Grades 9-12 524</td>
<td>31</td>
</tr>
<tr>
<td>Granite Falls Elementary</td>
<td>Grades 1-8 1,090</td>
<td>45</td>
</tr>
<tr>
<td>Rhodhiss Elementary</td>
<td>Grades 1-8 229</td>
<td>11</td>
</tr>
<tr>
<td>Dudley Shoals Elementary</td>
<td>Grades 1-8 235</td>
<td>10</td>
</tr>
<tr>
<td>Hudson High School</td>
<td>Grades 9-12 1,256</td>
<td>62</td>
</tr>
<tr>
<td>Baton Elementary</td>
<td>Grades 1-8 782</td>
<td>31</td>
</tr>
<tr>
<td>Hudson Elementary</td>
<td>Grades 1-8 1,462</td>
<td>57</td>
</tr>
<tr>
<td>Saw Mills Elementary</td>
<td>Grades 1-8 578</td>
<td>22</td>
</tr>
<tr>
<td>Whitnel Elementary</td>
<td>Grades 1-8 1,005</td>
<td>43</td>
</tr>
<tr>
<td>Hibriten High School</td>
<td>Grades 9-12 773</td>
<td>45</td>
</tr>
<tr>
<td>Happy Valley Elementary</td>
<td>Grades 1-8 580</td>
<td>28</td>
</tr>
<tr>
<td>Kings Creek Elementary</td>
<td>Grades 1-8 313</td>
<td>15</td>
</tr>
<tr>
<td>Oak Hill Elementary</td>
<td>Grades 1-8 255</td>
<td>12</td>
</tr>
<tr>
<td>Lower Creek Elementary</td>
<td>Grades 1-8 529</td>
<td>23</td>
</tr>
<tr>
<td>Valmead Elementary</td>
<td>Grades 1-8 392</td>
<td>18</td>
</tr>
<tr>
<td>Gamewell-Collettsville High</td>
<td>Grades 9-12 513</td>
<td>30</td>
</tr>
<tr>
<td>Gamewell Elementary</td>
<td>Grades 1-6 921</td>
<td>42</td>
</tr>
<tr>
<td>Gamewell Middle</td>
<td>Grades 7-8 295</td>
<td>16</td>
</tr>
<tr>
<td>Collettsville Elementary</td>
<td>Grades 1-8 393</td>
<td>203</td>
</tr>
</tbody>
</table>

In 1973-74, the instructional programs within the high schools varied considerably. Gamewell-Collettsville High School had 139 courses, seventeen of which were vocational. Lenoir High School offered sixty-eight courses and fourteen of these were considered vocational in nature. Hibriten included thirty vocational courses in a curriculum composed of seventy-four courses. Hudson offered a total of sixty-six courses, twenty of which were vocational in nature. Granite Falls High School included sixty-one courses of instruction and seventeen of those were vocationally oriented.

\[3^3\text{Ibid.}\]
Gamewell-Collettsville had a larger number of courses because their English Department was organized on a nine-week mini-course schedule. In the conventional semester organization, however, the 139 course offerings at Gamewell-Collettsville would more nearly equal sixty-seven courses.

Inequity in the size of the student bodies and the emphasis on academic instruction caused the more concerned citizens to consider merger a means of rectifying the situation. It was apparent that while Caldwell County had sufficient students to operate independently, the Lenoir system did not.

Public school mergers in North Carolina have been occurring since 1960. In 1960, there were 169 separate systems in the state, decreasing through merger to 149 systems in 1974-75. There were sixty-six county units, forty-nine city units and thirty-four partial units. The latter consisted of counties which were divided into separate units exclusive of cities. 4

During the same time span, there was also a downward trend in the number of school districts in the United States. In 1960-61, 36,427 districts were in existence. In 1970-71, there were 17,896 school districts in the United States. In 80 percent of these, fewer than 2,500 pupils were enrolled, which suggested the need for further consolidation. 5

The trend toward consolidation in Caldwell County is evident in Table 6. As illustrated in the table, the school population has

---


Table 6
Statistical Data - Caldwell County
Public Schools

<table>
<thead>
<tr>
<th>Date</th>
<th>No. Schools</th>
<th>Enrollment</th>
<th>Teachers</th>
<th>Principals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1930-31</td>
<td>64</td>
<td>5,093</td>
<td>150</td>
<td>8</td>
</tr>
<tr>
<td>1940-41</td>
<td>32</td>
<td>7,346</td>
<td>184</td>
<td>12</td>
</tr>
<tr>
<td>1950-51</td>
<td>21</td>
<td>8,840</td>
<td>255</td>
<td>16</td>
</tr>
<tr>
<td>1960-61</td>
<td>16</td>
<td>9,615</td>
<td>335</td>
<td>16</td>
</tr>
<tr>
<td>1974-75</td>
<td>24</td>
<td>14,200</td>
<td>702</td>
<td>24+</td>
</tr>
</tbody>
</table>

grown steadily while the number of schools has decreased by approximately one-third since 1930. Therefore, while the concept of merger was new to the public in Caldwell County, national precedent was not lacking and the public had experienced the consolidation of some county schools. This familiarity with the consolidation movement made the concept of merger easier for the public to understand and accept.

EDUCATIONAL ANALYSIS OF THE STUDY

Questions 3, 5, 6, 8, 10, 13, and 19 of the questionnaire were educational in their implications. Interview questions 1, 6, 10, 12, and 15 were considered educational. The analysis of educational factors included the interview, the questionnaire, a review of news coverage in the Lenoir-News Topic, and material gleaned from the Board of Education minutes.

6 Annual Statistical Reports, Caldwell County Public Schools, 1930-1974.
Expanded Curricula

Interviewees frequently used expanded curricula, or similar terms, to describe educational benefits of merger. Fourteen individuals, responding positively to questions 1 and 15 on the interview guide, interpreted expanded curricula to mean more programs of study and additional courses than available in smaller separate systems. Further, describing expanded curricula, they mentioned vocational courses, enrichment programs for both talented and handicapped students, and an expansion of auxiliary programs such as chorus, band, and athletics.

Libraries

In response to question 15 on the interview guide, four people suggested that a central library, well equipped and staffed might be an advantage of merger. By contrast, they stated that small schools seldom have really good libraries with professional librarians or adequate numbers and variety of books and reference materials. Three of the four interviewees stated that since merger occurred in their districts professional librarians have been employed who, in turn, have helped to improve both the libraries' resources and utilization of facilities.

Guidance Service

Improved guidance or counseling was listed as an educational advantage of merger. Interviewees suggested one aspect of the improvement would be to help students choose programs of studies and courses more suited to their aptitudes and interests. Five respondents to the questionnaire, discussing this matter, mentioned
the inadequacies of guidance departments before merger. The complaint was that guidance departments dealt primarily with college bound students rather than students having learning difficulties. They stated that the latter group needed more attention and adequate counseling concerning their programs of study. Eleven of the principals, in listing the educational advantages of merger, noted that the amount and quality of personal counseling, which involved helping students with family or other problems of a personal nature, increased following merger.

**Long-Range Planning**

Interviewees expressed opinions about long-range planning in terms of school plant construction. They believed that merger would result in the development of construction plans for a ten- to twenty-year period. The emphasis in most cases was on comprehensive high schools; however, elementary and junior high school construction received attention. As one individual pointed out, old high schools do not make good elementary school plants. Eighty-five percent of the principals, 94 percent of the superintendents, and 79 percent of the board chairmen, in responding to item 11 of the questionnaire, reported that merger had increased the ability of the merged unit to plan future needs more successfully.

**Stronger Professional Leadership**

Nine respondents in merged systems reported that reorganization enabled the systems to attract stronger professionals to the schools, including the superintendent, principals, and teachers. These professionals stated that increased size of schools with expanded
curricular offerings helped in the recruitment of teachers with advanced degrees and special aptitudes. They also believed that the caliber of administrative personnel had been improved through merger.

Teacher Specialists

Professional educators responding to the questionnaire, considered teacher specialists as instructors with master's degrees and study or degrees beyond that. However, they also classified as specialists teachers in areas such as foreign languages, art, and music as well as instructors for the academically talented and mentally retarded. Among these teacher specialists, they reported that specialists in vocational areas were more readily available. Comprehensive curricula, in merged systems, enabled specialists to work exclusively in their areas of specialty.

Diversified Auxiliary Programs

Referring to item 15 on the interview guide, eight interviewees considered athletics, namely football, and band auxiliary programs. Three of those, however, were more specific. They classified programs such as drama, piano, chorus, and various art media as auxiliary courses. Student clubs in this classification were science clubs, history clubs, and art clubs which appealed to the special interests of students. Fifteen of the responding principals mentioned student clubs either as auxiliary programs or enrichment activities.

Quality School Board Members

Under the heading of educational factors supporting merger, five superintendents expressed the belief that the quality of school board members had improved as a result of merger. They contended that
the merger had public support and, consequently, business and professional people were willing to serve on the board. One interviewee pointed out that the Caldwell County Board of Education had a dentist, a medical doctor, and five business executives as members.

**Instructional Innovation**

Merger increased the opportunity and willingness of teachers and principals to attempt innovative procedures and techniques, according to responding superintendents and principals. They stated that the increase in courses and the greater diversity of the student body improved innovation opportunities. Teachers became willing to implement new ideas and to try some non-traditional approaches to teaching because increased heterogeneity demanded more of them.

**Vocational Courses**

Interviewees considered an important advantage of merger the ability of schools to offer expensive vocational classes. They believed that agriculture should continue to be in the curriculum, but programs such as furniture design and drafting, welding, machine shop, cosmetology, printing, and brick laying were more likely to be available in a merged system with comprehensive high schools.

**Instructional Materials and Equipment**

Regarding the improvement of instructional materials and equipment in merged systems, respondents referred especially to audio-visual aides. They listed among recent acquisitions, after reorganization, items such as language masters, film-strip projectors, record players, cassettes, overhead and opaque projectors. Equipment
improvements included expansion and installation of expensive units such as science and language laboratories. Respondents stated that the efficient use of financial resources in merged systems enabled them to provide more and better materials and equipment than before merger.

**Improved Athletic Program**

Two respondents took note of the athletic program and the increased ability to compete in major sports as a result of merger. Football and basketball were most frequently mentioned. Comments were not confined to official athletic competition, however. Track, baseball and a strong intramural sports program were listed as benefits derived from merger. Emphasis was placed on getting all the students involved in physical activity. Seven of the interviewees (44 percent) expressed the belief that athletic programs in Caldwell County would improve as a result of merger.

**Academically Talented**

In response to the professional educational questionnaire, twenty individuals added the comment that students in all classifications, including the academically talented students in reorganized systems were offered more options in several areas of study; for example, in foreign language, advanced courses in mathematics, physics, and science. Small high schools had been unable to offer more than one foreign language, if any, and physics and chemistry were available frequently only every other year. Merger had enabled this situation to be improved.
Student Work Available

Merger of school systems and the resulting larger high schools enabled students to receive more work experience. Such work as assisting in the library, in the principal's office, and as aides to teachers were mentioned. Some other work experiences were custodial and maintenance employment at school. Off campus experiences included working in child care centers, health departments, and various municipal and public agencies as well as work experiences in industry.

Special Programs for Handicapped

Four of the interviewees (25 percent) considered programs for mentally and physically handicapped pupils important because all students should have the opportunity to develop their potential. Special programs involved curriculum development and the adaptation of physical facilities, tools, and equipment to accommodate the handicapped. According to ten of the responding superintendents, merger had been a factor in the ability of the system to expand those programs.

Enrichment Activities

Enrichment activities were listed but seldom defined. Two respondents listed such things as trips to the museum, a visit to the state or nation's capitol, and special events such as art exhibitions as examples of such activities. One individual considered class projects and work beyond the amount required to pass a course as enrichment.
Student Government

Five of the principals took note of student government. They felt that student government was more responsive and responsible since merger. They accounted for this change by stating that there was more interest in student elections, that the caliber of officers had improved, and that the student body generally had proved to be more cooperative. Respondents specifically stated that good student government had helped improve school discipline. The student government had also assisted in implementing an expanded curriculum.

Equalization of Educational Opportunity

The equalization of educational opportunity for all students was considered a major advantage of merger. Small schools, with limited educational programs, limited the education of students. A quality system, according to twelve of the principals, improved opportunities for the economically and culturally deprived student to overcome his situation. Equalization of educational opportunity meant increasing each student's options for developing his talents.

Industry Support of Education

Eighty-one percent of the interviewees held the opinion that the industrialization of Caldwell County had assisted the merger. It was their view that industry, the major taxpayer, would be more inclined to support one school system. In listing the educational advantages of merger, three superintendents and two board chairmen stated that industry had been more supportive of vocational and technical education since merger.
Retention

Over a long period of time, a comprehensive high school would be more successful in retaining students until they graduated. All the educational factors such as additional counseling, improved instruction, the increased variety of courses offered, and better qualified staff would contribute to the "holding power" of the school system. Five (31 percent) of the interviewees expressed this opinion.

In-Service Education

Improved in-service education for the entire professional staff was an important outcome of merger. Following reorganization, a change in environment for the high school staff made teachers and principals more receptive to professional improvement according to nine superintendents and thirteen principals. Three superintendents reported that in-service training was a regularly scheduled part of the school year since merger.

SUMMARY

The ability to offer a more comprehensive instructional program, including flexibility in scheduling, was most frequently cited advantage of merger by both respondents to the questionnaire and the influentials interviewed. This was followed closely by the employment of subject area specialists and the improvement of in-service programs for administrators and teachers. The equalization of educational opportunities for all students was listed as the fourth most important consideration in systems that had experienced merger.
Some other important educational benefits derived from merger were the scheduling of teacher-planning time into the daily schedule and improvement in instructional supervision.

Educational benefits of merger listed at least once by respondents were: (1) improvement in instruction, (2) the lowering of the pupil-teacher ratio, (3) the elimination of small, three- to six-teacher schools, (4) the employment of non-teaching principals, and (5) the ability to offer a sequential program for exceptional children.
Chapter 7

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

This study was concerned with determining the social, economic, and educational trends that led to the merger of the Caldwell County and Lenoir public school systems. The writer sought to learn how each of these factors, separately and collectively, brought the leadership of the community and the public to implement merger as a means of improving education. (see Appendix F)

SUMMARY

The Literature

Authors in the field of educational theory have long maintained that the majority of school districts in the United States were too small to provide adequately for the educational needs of their students. These writers differed in specific detail; however, their conclusions were similar. Their claims of inadequacy were based on the lack of financial support for educational programs and school plants, the lack of a comprehensive education for all students due to limited enrollments, and the inability of a given school district to attract quality professional personnel.

The belief was expressed that a school district should enroll a minimum of ten thousand students, the exception being in sparsely settled areas, where the time and distance involved in travel was excessive. These writers believed that a district composed of at
least ten thousand students was necessary to provide the tax base needed to support adequate school plant construction and to provide funding for a comprehensive educational program from kindergarten through grade twelve. The literature further pointed out that larger school districts enabled realistic planning in regard to construction, professional personnel needs, and provision for adequate custodial and maintenance care of school buildings and grounds.

Educational authors dealt with the problem of community resistance to merger. The most prevalent reason for resistance to merger was fear—fear of the loss of local control and fear of losing a valuable social and economic asset to the community. This fear frequently involved a personal dimension. Parents were concerned about the loss of close ties between the school and community and the loss of parental influence on their children.

Other factors involved in resistance to merger included the prospect of higher taxes to support schools, the lack of appreciation of the fact that society has changed with the consequent need for change in school courses and programs, and the fear of superintendents and school board members that they might be asked to sacrifice their positions. Parents were concerned about travel time on buses and a decline in community involvement with schools.

The literature did not present merger as the answer to all educational questions. To the contrary, the public was encouraged to ask questions and require answers from boards of education. The foremost concern the public needed satisfied was the question of the quality of education. Is the present school system meeting the needs,
interests, and abilities of all students? The literature also stated that the issue of the efficient use of financial resources, personnel, facilities, and equipment must be satisfied. Was the existing school district operating efficiently in these areas? If the answer to those questions was yes, then merger was unnecessary.

**Questionnaire and Interviews**

Responses from superintendents, board chairmen, and selected principals in merged school systems disclosed a remarkable resemblance to the reasons in support of merger found in the literature reviewed. The opinions expressed with regard to the merger of the Caldwell County and Lenoir school systems by the sixteen influential interviewees was also supported by the literature and was similar to the responses of the professional educators. The only specific issue raised by the questionnaire responses and in comments by interviewees that was not discussed in the literature reviewed was the problem of racial mix.

Due to particular circumstances in Lenoir, it was believed that racial integration was a major consideration in the merger. This was especially reflected in the opinions expressed by the influential citizens interviewed. The interviewees stated that the educational climate in Lenoir had deteriorated since integration and merger would improve the situation. To a lesser extent, the same view was expressed by the respondents to the questionnaire.

Housing patterns in the county were an additional factor affecting the merger. The boards of education in both the county and in Lenoir concluded that growth patterns would continue to show a population increase outside the Lenoir Administrative School District.
Respondents to the questionnaire and the interviewees believed that merger of the school systems had or would improve the educational system. The view was held that students would have greater opportunities and that these educational opportunities would be more nearly equalized among pupils. Improved curricula, better teachers and administrators, the employment of specialists in subject areas, and more auxiliary services were believed to be positive results of merger.

It was believed by the citizens interviewed that long-range planning could be better attained by merger. Planning involved educational programs, but school plant construction was paramount in their thinking. Furthermore, the utilization of personnel and the ability to attract various specialists could be better planned through merger.

It was the consensus of thinking among both the professional educators questioned and the influential citizens interviewed that financial support would improve in a merged system. This was stated in terms like "one board requesting money is better than two" or "one board will eliminate competition for the local educational dollar."

Both the respondents and the citizens interviewed cited increased efficiency and use of resources as paramount considerations in merger. The advantage of one administrative staff was pointed out by numerous respondents. Utilization of professional personnel, centralized purchasing, and school plant maintenance were other areas in which efficiency of operation was believed improved in merged systems.
Possible Disadvantages of Merger

The focus of this study was on the positive aspects of merger. However, the writer would be remiss not to mention some possible disadvantages to merger as revealed in the literature and the study of the Caldwell County-Lenoir school merger. The possible disadvantage mentioned most frequently was the lack of leadership opportunity for the average student. Some feared that this student might get lost in the crowd. Another related opinion was that as high schools moved from the immediate vicinity, citizens might manifest less interest in the schools. In conjunction with this was the concern related to greater professional domination of the schools. Several respondents further stated that elementary schools might experience neglect in the larger system, because merger in Caldwell County had concerned talk about the high schools while elementary education was rarely mentioned.

CONCLUSIONS

The investigation of the Caldwell County-Lenoir public school merger led to the following conclusions:

1. The racial situation in Lenoir prompted the Lenoir Board of Education to seek merger as a means to alleviate the situation.

2. The business and commercial areas of Lenoir had expanded. Thus, housing construction and population growth had moved outside the immediate Lenoir area.

3. It was believed by both boards of education and the community leadership that growth would continue to accelerate in areas beyond the Lenoir Administrative Unit.
4. The "power structure" desired a merger of the two school systems for economic reasons.

5. There was genuine concern about the education of all students. Merger was seen as a means of increasing educational opportunity and quality of programs.

6. A merged system could construct comprehensive high schools and increase the number of course offerings. Technical and vocational courses would become more readily available.

7. The athletic programs and high school bands would improve as a result of merger.

8. Financial support for public schools would increase. This support would include funds for construction, programs and specialized personnel.

9. Concern for the improvement of education was real; however, social and economic considerations were paramount reasons for support of the merger.

10. Merger was seen as a means of unifying the larger community and securing acceptance by the people of other unified public services.

RECOMMENDATIONS

The following recommendations were made as a result of this study:

1. Students and educational programs should receive top priority when the merger of school systems is being considered.

2. The Lenoir School District was too small to function as a viable system.
3. The public should be completely, truthfully, and repeatedly informed regarding the reasons for merger.

4. Questions raised concerning the wisdom of a proposed merger must be confronted and answered.

5. The administrations and faculties of the systems involved should be convinced of the wisdom of merger.

6. A realistic level of funding should be presented to the public.

7. The local funding body, in North Carolina the county commissioners, should be convinced that merger is in the best interest of the community.
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APPENDIX A

School Merger Data, North Carolina
<table>
<thead>
<tr>
<th>Administrative Units Merger</th>
<th>Date Effective</th>
<th>Merger A Result of</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Charlotte-Mecklenburg</td>
<td>7-1-60</td>
<td>Voted</td>
</tr>
<tr>
<td>2. Forsyth-Winston-Salem</td>
<td>7-1-63</td>
<td>Voted</td>
</tr>
<tr>
<td>3. Granville-Oxford</td>
<td>7-1-63</td>
<td>Voted</td>
</tr>
<tr>
<td>4. Scotland-Laurinburg</td>
<td>7-1-64</td>
<td>Voted</td>
</tr>
<tr>
<td>5. Haywood-Canton</td>
<td>7-1-65</td>
<td>Voted</td>
</tr>
<tr>
<td>6. Chowan-Edenton</td>
<td>7-1-67</td>
<td>Voted</td>
</tr>
<tr>
<td>7. Richmond - Hamlet City Rockingham City</td>
<td>7-1-67</td>
<td>Legislative Enactment</td>
</tr>
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APPENDIX B

Merger Questionnaire for Professional Educators
1. The reorganization/merger of two or more school districts within a county into one administrative unit enhances the governmental relationship between the new school board and the county commissioners.

2. It is more difficult to plan for orderly growth in a school system when more than one system exists within the county.

3. Reorganization/merger was accomplished in my county without apparent loss of quality in education for any group of students within the merger system.

4. The question of merger should be decided by a vote of the people within the county.

5. Through the reorganization process and the establishment of uniform programs and policies the total community is more supportive of the merged school system.

6. Small school districts are desirable (under 5,000 students) because the competition among districts results in better educational programs and improved community support.

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7. Reorganization/merger brings about an improved educational program because it results in a more economical operation within the district.

8. Reorganization resulted in the elimination of duplicate services within the county.

9. The state legislature should provide incentive to encourage reorganization of school districts in all counties.

10. By combining resources of the merger unit it has been possible to establish desirable standards for all schools as they relate to program improvement.

11. A larger planning area resulting from reorganization makes it possible to develop more comprehensive long-range plans to meet present day demands being made upon the public schools.

12. Reorganization/merger has not reduced the expenditures for public education.

13. Through reorganization/merger it becomes possible for a larger unit to develop a complete staff organization with specialists who spend their time entirely in their areas of specialization.

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14. Greater efficiency has been realized in all logistical services such as:

- Food Services
- Pupil Personnel Services
- Maintenance of School Plant
- Bus Transportation

15. The establishment of uniform program and policies tends to stabilize the community and to present a unified front to the public when interpreting the needs of the school system.

16. Large scale purchasing, storage and distribution of equipment and supplies have resulted in greater efficiency within the district.

17. Through reorganization/merger the problems of integration, shifting population, and the growing demand for quality schools have been reduced.

18. North Carolina should create a commission to make a master plan of school district reorganization.

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19. Please list 3-5 educational factors which contributed to the merger of the school system.

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20. Please list 3-5 economic factors which contributed to the merger of above mentioned system.

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21. Please list 3-5 social factors which contributed to the merger of the aforementioned system.

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** Please indicate below other reactions which you may have based on your experience in a reorganized school system.
## ANALYSIS OF PROFESSIONAL QUESTIONNAIRE

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</tbody>
</table>
APPENDIX C

Interview Guide
1. Do you think that merger of the school systems will improve educational opportunities in Caldwell County? Yes ___ No ___
Could you give me three reasons for your reply?
1. 
2. 
3. 

2. Were you sympathetic to the merger? Yes ___ No ___
Why?

3. Do you think that industrialization of Caldwell County promoted the merger concept? Yes ___ No ___

4. What do you think of the position taken by the Lenoir Chamber of Commerce in regard to the merger?

5. Has the migration of people from the Mid-west and North influenced public education in Caldwell County? Yes ___ No ___
How have these people contributed to education?
1. 
2. 
3. 

6. Has the presence of Caldwell Community College and Technical Institute influenced public education in the county? Yes ___ No ___

7. Do you think local taxes will increase as a result of the merger? Yes ___ No ___

8. Do you consider the merger to be politically motivated? Yes ___ No ___

9. Will the school merger result in a stronger financial base for public school support in Caldwell County? Yes ___ No ___

10. Do you feel that three consolidated high schools in the county will increase the number of high school graduates in the county? Yes ___ No ___

11. Do you think that racial integration in the Lenoir schools influenced the move toward merger? Yes ___ No ___
12. Do you think merger was promoted primarily for educational purposes (Welfare of students) or other reasons? Yes ___ No ___
   If no, what other reasons?
   1.
   2.
   3.

13. Could you enumerate 1-5 social factors that contributed to the merger?
   1.
   2.
   3.
   4.
   5.

14. Could you enumerate 1-5 economic factors that worked toward the merger?
   1.
   2.
   3.
   4.
   5.

15. Basically we are concerned with education. Can you give me 1-5 educational advantages and/or disadvantages you expect to result from the school merger?
   Advantages:
   1.
   2.
   3.
   4.
   5.

   Disadvantages:
   1.
   2.
   3.
   4.
   5.

16. Do you think the business affairs such as personnel assignments, food purchasing, transportation, and school plant maintenance will improve as a result of the merger? Yes ___ No ___

17. If you were to select one reason for the merger of the Caldwell County - Lenoir school systems, what would it be?
Analysis of Interviews

16 Interviewees

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>Number</td>
<td>Percent</td>
</tr>
<tr>
<td>1-</td>
<td>12</td>
</tr>
<tr>
<td>2-</td>
<td>14</td>
</tr>
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<tr>
<td>12-</td>
<td>13</td>
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Twelve questions required a yes/no reply. Numbers 13 through 17 required a listing of answers.
APPENDIX D

Comparative Tax Statistics & Comments,
Caldwell County, 1974
<table>
<thead>
<tr>
<th>Description</th>
<th>1973</th>
<th>1974</th>
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<tbody>
<tr>
<td>(1) Total Tax Accounts</td>
<td>27,039</td>
<td>26,641</td>
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<tr>
<td>(2) Total Late List Penalties</td>
<td>$17,443.18</td>
<td>$33,259.14</td>
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<tr>
<td>(3) Total County Personal Tax</td>
<td>$1,008,439.34</td>
<td>$1,371,126.17</td>
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<tr>
<td>(4) Total County Real Estate Tax</td>
<td>$1,677,369.04</td>
<td>$1,832,898.69</td>
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<tr>
<td>(5) Total Acres for Tax</td>
<td>243,410</td>
<td>245,246</td>
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<tr>
<td>(6) Total Lots for Tax</td>
<td>22,855</td>
<td>26,966</td>
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<tr>
<td>(7) Total County Tax paid by Business</td>
<td>$1,131,084.91</td>
<td>$1,344,887.58</td>
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<tr>
<td>(8) Total County Tax paid by Individuals</td>
<td>$1,554,723.47</td>
<td>$1,859,137.28</td>
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<tr>
<td>(9) Total Tax Sawmills Sanitary District</td>
<td>$27,095.35</td>
<td>$33,010.79</td>
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<tr>
<td>(10) Total Tax North Catawba Fire Dist.</td>
<td>$17,728.59</td>
<td>$20,515.27</td>
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<tr>
<td>(11) Total Tax Pearland Fire District</td>
<td>$13,105.53</td>
<td>$15,639.90</td>
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<td>(12) Total Tax Valmead/Lower Creek F.D.</td>
<td>$6,119.61</td>
<td>$8,442.05</td>
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<td>(13) Total Tax Gamewell Fire District</td>
<td>$26,039.16</td>
<td>$30,949.36</td>
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<td>(14) Total Tax East Caldwell F.D.</td>
<td>$3,724.05</td>
<td>$4,400.97</td>
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<td>(15) Total Tax Patterson Fire District</td>
<td>$6,166.40</td>
<td>$7,132.99</td>
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<tr>
<td>(16) Total Tax Grace Chapel Fire Dist.</td>
<td>$26,039.16</td>
<td>$30,949.36</td>
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<tr>
<td>(17) Grand Total</td>
<td>$2,810,323.25</td>
<td>$3,365,872.78</td>
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Valuation:
- Real Property: $321,544,805
- Personal Property: $206,036,096
- Corporate Excess: $34,512,350
- Total: $562,093,251

Tax Shares:
- Business: 42%
- Individuals: 58%

Homestead Exemptions: $8,386,211
Personal Exemptions: $5,535,081

Tax Charges:
- General Fund: $763,776.81
- Debt Service: $560,704.35
- Current Expense: $1,489,871.56
- Capital Outlay: $169,813.32
- Community College: $224,281.74
- Revaluation: $28,836.22
- Total: $3,237,284.00

Taxes for Education:
- Rate
- Amount
  - Current Expense: $265
  - Capital Outlay: $0.30
  - Debt Service (School): $0.85
  - Total: $380
  - Community College & T.I: $0.40
  - Debt Service (College): $0.05
  - Total: $426

Sub-total: $1,489,871.56
478,908.75
224,281.74
34,930.00
2,397,805.37

Total Taxes: $3,237,284.00

### Other:

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<th>Rate</th>
<th>Amount</th>
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<td>General Fund</td>
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<td>Debt Service (General)</td>
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<td>Revaluation</td>
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<tr>
<td>Grand Total</td>
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### Taxes for Education: (Schools 67%) (CCCTI 7%) Total 74%

- **Taxes for other:** 26%
- **Average tax paid by individuals:** $76.23
- **Average tax paid by business:** $596.66
APPENDIX E

An Act to Establish the Boundary Lines of the Lenoir Administrative Unit
AN ACT TO ESTABLISH THE BOUNDARY LINES OF THE LENOIR SCHOOL
ADMINISTRATIVE UNIT, FORMERLY DESIGNATED AS THE LENOIR GRADED
SCHOOL DISTRICT.

The General Assembly of North Carolina do enact:

Section 1. The boundary lines of the Lenoir School Administrative
Unit, formerly known as the Lenoir Graded School District, shall
coincide and be coextensive with the corporate boundary lines of the
City of Lenoir,

Sec. 2. That in the event additional territory is annexed
to and becomes a part of the corporate territory of the City of Lenoir,
the school district line shall automatically be extended to include
any territory so annexed.

Sec. 3. All laws and clauses of laws in conflict with this
Act are hereby repealed.

Sec. 4. This Act shall be in full force and effect from and
after its ratification.

In the General Assembly read three times and ratified, this
the 1st day of May, 1963.

AN ACT TO REPEAL CHAPTER 338 OF THE SESSION LAWS OF 1963 RELATING
TO THE BOUNDARY LINES OF THE LENOIR SCHOOL ADMINISTRATIVE UNIT.

The General Assembly of North Carolina do enact:

Section 1. Chapter 338 of the Session Laws of 1963 is hereby
repealed.

Sec. 2. The boundaries of the Lenoir School Administrative
Unit shall remain as they were on January 1, 1969, until altered in
the manner prescribed by Chapter 115 of the General Statutes of
North Carolina,

Sec. 3. All laws and clauses of laws in conflict with this
Act are hereby repealed.

Sec. 4. This Act shall be effective upon its ratification.

In the General Assembly read three times and ratified, this
the 11th day of February, 1969.
APPENDIX F

Merger Agreement
Pursuant to the provisions of and authority contained in North Carolina General Statute 115-74.1, the undersigned, LENOIR GRADED SCHOOL DISTRICT TRUSTEES ("City Board") and the CALDWELL COUNTY BOARD OF EDUCATION ("County Board"), each being a body corporate created and existing under the laws of the State of NORTH CAROLINA, hereby agree:

1. PLAN OF MERGER.

1A. AGREEMENT TO MERGE. On July 1, 1974, at noon, or the day following the satisfaction of the conditions in paragraph 3 hereof, whichever is last, the following events shall occur:

1A(1). The Lenoir City School Administrative Unit and the Caldwell County School Administrative Unit shall merge into a single school administrative unit, to be named the Caldwell County School Administrative Unit.

1A(2). The City Board and the County Board shall merge into a single Board of Education, to be named the Caldwell County Board of Education, to administer all the public schools throughout Caldwell County.

1B. MERGED BOARD. The Caldwell County Board of Education ("Merged Board") shall originally be composed of an interim board of seven (7) persons (the "Initial Merged Board"), consisting of Dr. Allen R. Hefner, James L. Clark, Barbara Deverick, Marcus Deal, Janet Wilson, Roy Reid, and Robert N. Styres; and thereafter an elected board, composed of the number of persons and chosen in accordance with the provisions of either paragraph 1B(1) or paragraph 1B(2) hereof whichever shall be applicable.
1B(1). The "Initial Merged Board" shall seek the enactment by the General Assembly prior to July 1, 1974, of a local act to provide:

(a) That, from and after the effective date of said local act, the "Initial Merged Board" shall become the "Merged Board", and the "Merged Board" shall continue to be composed of seven (7) persons, consisting initially of those persons then holding office, and thereafter of those persons elected in a nonpartisan election and as provided in the succeeding subparagraphs hereof.

(b) That the terms of office of Marcus Deal, Janet Wilson, and Robert N. Styres shall expire on the first Monday of the month following the General Election in 1974; that the terms of office of Roy Reid and Barbara Deverick shall expire on the first Monday of the month following the General Election in 1976; and that the terms of office of Allen R. Hefner and James L. Clark shall expire on the first Monday of the month following the General Election in 1978.

(c) That the full term of office of members of the "Merged Board" at the expiration of terms specified in subparagraph 1B(1)(b) above shall be for four (4) years each and until their successors shall be elected and qualified; except, however, that in the General Election to be held in 1974, the two candidates receiving the largest number of votes for the three available seats shall be elected for a four (4) year term, such terms to expire on the first Monday of the month following the General Election in 1978, and the candidate receiving the third largest number of votes shall be elected for a two (2) year term, such term to expire on the first Monday of the month following the General Election in 1976. In the General Election held in 1976, three members shall be elected to fill the three terms then expiring and in
1978 four members shall be elected to fill the four terms then expiring. In the General Elections thereafter, either three or four members will be elected to fill the terms as they expire.

(d) That all candidates for membership on the Caldwell County Board of Education shall file for a nonpartisan election with the Caldwell County Board of Elections a notice of such candidacy by noon on the last Monday in August prior to the General Election, and this election shall be held at the time of said General Election. Each candidate shall pay a filing fee of Five Dollars ($5.00) and in addition shall certify in writing that he is a bona fide resident of Caldwell County and a qualified registered voter therein. Persons elected shall assume office on the first Monday of December following the General Election. The requirements set forth in this paragraph, along with such requirements as are now or hereafter provided for by the North Carolina General Statutes, are inclusive and constitute the sole criteria for membership on the Caldwell County Board of Education.

(e) That all persons registered and qualified to vote in accordance with the General Election laws of North Carolina shall be eligible to vote in the nonpartisan election for the members of the Caldwell County Board of Education.

(f) That in the event of a vacancy on the Caldwell County Board of Education by reason of death, resignation, or a member's failing to meet the residency requirements as set forth above, the remaining members of the Caldwell County Board of Education shall appoint a person to serve until the next election of members of such board, at which time the remaining unexpired term of the office in which the vacancy occurs shall be filled by election.
1B(2). If the General Assembly shall fail or refuse to enact the local act described in subparagraph 1B(1) hereof, then the terms of office of all members of the "Initial Merged Board" shall expire as set forth in subparagraph 1B(1)(b) above, and the three terms scheduled to expire on the first Monday in December in 1974 shall be deemed to create only a single vacancy on the "Merged Board". A single member shall be elected to fill this vacancy for a term of four (4) years at the time of the General Election in 1974, from candidates filing as set forth in subparagraph 1B(1)(d) above. Provisions of this subparagraph 1B(2) shall not take effect unless the General Assembly shall fail to pass local legislation as set forth in subparagraph 1B(1) above.

1C. TERMINATION OF CERTAIN OFFICES. The terms of office of those members of the "City Board" and "County Board" who shall not be selected as members of the initial "Merged Board" will terminate at the time the merger becomes effective.

1D. POWERS, ETC. OF MERGER BOARD. The "Merged Board" shall have all the authority, powers and duties, express and implied, vested in county boards of education, generally, by Chapter 115 of the General Statutes of North Carolina, and all revisions and amendments thereto, and so many of the powers and duties, not in conflict with this agreement, as heretofore have been granted by any session law, public-local or private act of the General Assembly of North Carolina pertaining to the "City Board" and "County Board" or either of them.

1E. TRANSFER OF FACILITIES, ETC. All properties, facilities, structures, funds, contracts, deeds, titles, and other assets, obligations and liabilities of the "City Board" and "County Board" shall be transferred to and become vested in the "Merged Board" at the time the
merger shall become effective, all without the necessity of the execution and delivery by the "City Board" and the "County Board" of any instruments of conveyance or assignment, or by the "Merged Board" of any instrument undertaking the assumption of said obligations and liabilities. Provided, this agreement shall be filed and duly indexed as in case of transfers of real estate, in the office of the Register of Deeds of Caldwell County, on the date the merger shall become effective, or as soon thereafter as practicable, but the failure to file this agreement shall not invalidate the provisions of this paragraph.

1F. ORGANIZATION OF MERGER BOARD. At 10:00 o'clock A. M., on the Effective Date, or as soon thereafter as practicable, the members of the initial "Merged Board" shall qualify, meet and organize. They shall elect from their membership a chairman, and may elect one or more vice chairmen to hold office until the first Monday in December of the same or following year in which there shall be a Primary Election for County Officers in Caldwell County, and biennially thereafter, when the "Merged Board" shall reorganize. They shall fix the compensation to be paid to members for expenses in the amount provided in General Statute 115-29. Thereafter, the "Merged Board" shall meet on the first Monday in each month, or as soon thereafter as practicable. It may elect to hold regular meetings at more frequent intervals, and may meet in special session upon the call of the chairman or the secretary as often as the business of the Administrative Unit may require.

1G. POWERS OF INITIAL MERGER BOARD. During the period April 1, 1974, through June 30, 1974, the "City Board" and "County Board" shall continue to operate the public schools of the Lenoir Graded School District Administrative Unit and the Caldwell County Administrative
Unit as provided for in the General Statutes of the State of North Carolina, except that the "Initial Merged Board" is authorized to assume the responsibilities of the "City Board" and the "County Board" in the matter of budget preparation for the fiscal year beginning on the effective date of the merger; and for the development of all plans for school construction; and any other plans essential to the operation of the public schools on and after the merger date of July 1, 1974, including the power to employ all persons and enter into such contracts and agreements as may be necessary for administration and operation of the public schools.

1H. ORGANIZATION OF INITIAL MERGED BOARD. Within Fourteen (14) days after April 1, 1974, the chairman of the "County Board" shall convene the "Initial Merged Board", as defined in paragraph 1B herein. The officers of the "County Board" shall serve as the officers of the "Initial Merged Board". It shall be the duty of the secretary to keep written minutes of the meetings of the "Initial Merged Board", which minutes shall be kept as a part of the permanent records of "Merged Board". A majority of the members of the "Initial Merged Board" shall constitute a quorum and a majority of those present shall be sufficient to carry any issue.

1I. SUPPLEMENTAL SCHOOL TAX. The supplemental school tax presently authorized to be levied by the City of Lenoir City Council within the Lenoir City School Administrative Unit shall not be continued in effect following the implementation of this agreement.

2. PUBLIC HEARINGS. The "City Board" and "County Board" shall conduct a public hearing in respect to the plan of merger set forth herein. The public hearing shall be announced not less than
ten (10) days prior thereto by advertisement at least once in a newspaper having general circulation in Caldwell County.

3. **CONDITIONS.** The plan of merger shall not become effective or be implemented unless it shall have been approved in writing by the Board of Commissioners of Caldwell County and the State Board of Education. However, the question of merger shall not be contingent upon a vote of the people in the area affected.

4. **ENTIRE AGREEMENT.** The terms and conditions set in this instrument constitute the entire agreement between parties and shall supersede all previous communications, representations, or agreements, whether oral or written, between the parties hereto with respect to the subject matter hereof.

IN WITNESS WHEREOF, this agreement is signed and sealed, pursuant to authority duly given by the City Board at a lawful meeting held ____________, 1974, and by the County Board at a lawful meeting held ____________, 1974, this the ____________ day of June, 1974.
APPENDIX G

Letters
Dr. H. C. Cole, Superintendent
Wilson County Schools
Wilson, North Carolina

Dear Dr. Cole:

I am enrolled in the doctoral program at East Tennessee State University, Johnson City, Tennessee. At the moment, I am doing research on public school mergers in the United States for use in my dissertation. Specifically, I expect to make a detailed analysis of educational, economic, and social factors which led to the merger of the Caldwell County-Lenoir public school systems.

In the process of collecting data, I secured a copy of your study relating to the possible merger of Wilson City, Elm City, and Wilson County public schools. Your questionnaire to board chairmen and superintendents has special significance to my study.

May I have your permission to use your questionnaire and make minor adaptations to my study.

Should you grant permission, I shall, of course, credit the source.

Yours truly,

Steward Kirby

SKh
August 7, 1974

Mr. Steward Kirby
106 Pineburr Road
Lenoir, N. C. 28645

Dear Mr. Kirby:

Thank you for your letter of July 22 concerning the use of my questionnaire to Superintendent's. Please feel free to make whatever use you can of the questionnaire. It may need some revision by now but it is a good questionnaire that reveals needed information.

I would be interested in your study because I hope to do some further writing on the subject.

Sorry my reply was late since I have been away on vacation.

Very sincerely,

/s/ Henry Cole

Dr. Henry C. Cole
Superintendent

HCC/ks