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Restructuring Alberta School Systems

by

David Paul Pysyk



**A thesis submitted to the Faculty of Graduate Studies and Research in partial fulfillment of
the requirements for the degree of Doctor of Philosophy**

in

Educational Administration and Leadership

Department of Educational Policy Studies

Edmonton, Alberta

Spring 2000



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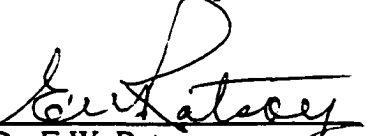
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Dedication

This dissertation is dedicated, in loving memory, to my late father, Paul Pysyk. He was a devoted family man who strongly believed in the riches of God, family, and education. His greatest dream was to see his children and grandchildren succeed in school and life. Although he was unable to see me graduate, his love and teachings will always be remembered.

Abstract

In 1994, Alberta underwent a number of operational and structural changes relevant to the delivery of education. The decision to reduce the number of school jurisdictions from 141 to a target of 60 was viewed as a significant change in provincial policy directed at increasing basic education effectiveness and efficiency.

This study addressed the perceptions of trustees, superintendents, principals, and teachers regarding the transformation of a newly merged school jurisdiction and the impact of that merger on school system operations. The major question was, "What impact has restructuring had on the three school jurisdictions that were amalgamated?"

The investigation was conducted as an interpretive case study, using in-depth analysis. Data were gathered using semi-structured interviews recorded on audio tapes and subsequently transcribed.

Six major issue areas were identified as having significant impact on school system operation. These were: (a) the need for merger in these three jurisdictions; (b) the merger process; (c) school system size; (d) the impact on various levels of personnel; (e) efficiency and effectiveness; and (f) the educational bottom line relevant to students and programs.

Five conclusions emerged from the study: (a) the need for these three school jurisdictions to merge was never fully established; (b) the implementation costs associated with the merger exceeded any resulting savings; (c) consolidation was not seen to have brought about any significant educational reform; (d) the increase in jurisdiction size provided students, teachers, and administrators with additional personal and educational opportunities; and (e) some participants indicated they were positively affected, others negatively affected, and the remainder reported that they were not affected by the merger.

This study and the related literature reviewed suggest: (a) a need for consolidation be established before embarking on the process; (b) other jurisdictions

contemplating similar changes should ensure that the anticipated savings are actually attainable; (c) when restructuring organizations having elected boards, the changes should coincide with the end of term of current board members; and (d) changes in the way educational organizations operate should ultimately translate into enhanced student learning.

Acknowledgements

Special thanks,

to my supervisor

Dr. Frank Peters

**for his scholarship and research suggestions,
for his support and encouragement,
for his suggestions and direction,
and for his attention to detail;**

to my committee

**Dr. E.W. Ratsoy
Dr. J.L. da Costa
Dr. D. Richards
Dr. D. Sande
Dr. V. Hajnal;**

to my family

**Evie
Parker
Oriana;**

**for their love,
encouragement,
support,
time,
patience,
and understanding;**

to my fellow graduate students and now life long friends

**Colin Kelly
Norman Yanitski
Dave van Tamelen
Margaret McVea;**

**for their encouragement,
support and advice,
reviews and suggestions,
and friendship;**

and to the participants in the study

for sharing their stories.

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CHAPTER 1

Restructuring Alberta School Systems

Times are changing. Structures are crumbling. Reference points are vanishing. We are left only with questions and choices. Tough questions; frightening choices. What are our belief systems? Are the structures that support them still serving us? Are we clear enough -- brave enough -- to interrogate our actions? What commitment are we making to the force of compassion? Who are we and how do we choose to believe? Voices call from many directions. Which way do we go? (Cooper, 1996, p. 5)

Introduction

Change, change, and more change. Change, like death and taxes, continues to be one of life's inevitable certainties. Yet the world is full of uncertainties. Life has become turbulent and fraught with a multitude of complex challenges that are the result of the proliferation of scientific discoveries, restructuring of organizations, and numerous social and economic changes.

The field of education is not immune to change and its effects. In many nations around the globe, business and government have called for a massive restructuring of education. The Canadian School Boards Association (1995) identified four recent trends in Canadian school governance: reduction in the number of school boards; redefinition of school board powers and responsibilities; centralization of power at the provincial level; and the redistribution of some responsibilities to school-based parent or community councils. The Manitoba School Divisions/Districts Boundaries Review Commission (1994) indicated that since 1990, every province in Canada has initiated discussions and introduced changes that will affect the method of delivery, accountability, fiscal responsibility, and quality of education. New Brunswick became the first Canadian province to eliminate school boards. Ontario, Manitoba, Saskatchewan, Prince Edward Island, and British Columbia have all amalgamated local boards into fewer larger units. Quebec and Newfoundland have invoked constitutional changes to restructure their school

governance model and Alberta has reduced the number of school jurisdictions by over 50%, from 141 to 63. This current wave of educational restructuring requires in-depth investigation to determine the impact and effectiveness of the process.

In January of 1994, the then Minister of Education for Alberta, Halvar Jonson announced, in a long-awaited press release, a major restructuring plan for basic education in the province. The announcement outlined the implementation of a number of policy and directional changes. Jonson (Alberta Education, January 18, 1994) indicated that “quality education, fiscal equity, accountability, and cost control were the essential considerations in determining future direction for education in the province” (p. 1). A synopsis of these policy and directional changes as presented by Peters and Richards (1995, pp. 2-3) is as follows:

Governing Structures

- (1) Reduce the number of school boards
- (2) Refocus the responsibilities of school boards
- (3) Phase in the appointment of superintendents by the Alberta Department of Education
- (4) Reduce and restructure the Department of Education

Fiscal Structures

- (1) The Government will assume full responsibility for funding public education
- (2) Implement expenditure controls
- (3) Reduce grants for education

School Management

- (1) Increase authority of schools
- (2) Increase involvement of parents, community and business in schools
- (3) Increase choice for parents and students

Charter Schools

- (1) Approve legislation permitting charter schools

Program

- (1) Improve coordination of the delivery of services to children
- (2) Expand achievement testing and diploma examinations
- (3) Increase and improve reporting by government, boards, and schools.

Six years after the heralded news release, most of the proposed initiatives had been implemented in Alberta, some had been shelved and others, like school councils and reporting procedures, were being redrafted, redefined, and re-regulated.

Other than the issues related to funding and local tax requisitions, the decision to reduce the number of school boards in the province from 141 to a target of 60 was seen by Peters and Richards (1995, pp. 3-6) as one of the most “prominent” (p. 3) changes towards increasing basic education efficiencies. In another news release, Jonson (Alberta Education, February 24, 1994) again expressed a strong position for educational reform by stating, “Our education system is moving in new directions with dramatic changes to the way we govern, administer and deliver education. The status quo is not an option if we are to have a strong public education system, able to prepare our students for the workforce and life-long learning” (p. 2). As governments and school jurisdictions around the globe investigate the possibilities and impacts of restructuring and amalgamation, they will face numerous issues related to “improving educational opportunities and, at the same time, create a structure that is responsive to local needs and allows people to have a voice in the decisions that affect them” (Redekopp, 1995, p. 26). Reddyk (2000) concurs, indicating that:

Systems need to be both big and small: big to realize economies of scale and provide a full range of educational services; small to allow citizens to have a voice in the decisions that affect their children. Systems need to be centralized and decentralized: centralized to provide consistency and some efficiencies; decentralized to ensure community support and responsiveness to local needs. (p. 6)

Jonson (Alberta Education, February 18, 1994), recognizing these issues added that, “In proceeding to reduce the number of school boards we must ensure that the future regional structures reflect the needs of local communities and students, and the need to reduce our administrative overhead” (p. 1).

In the wake of all these changes, this study examines, from an Alberta perspective, the impact of amalgamation on school system operations and structure. This research provides insight into the changing roles of stakeholders within the new jurisdictions and examines the process by which organizations successfully cope with substantial structural change.

Need for the Study

In restructuring education in Alberta, it appears that the central focus of the government was to reallocate educational spending, in an attempt to create an affordable, effective and equitable education system. For example, Jonson (Alberta Education, February 24, 1994) states, "The restructuring of our education system will ensure quality education for all Alberta students, at a cost that Alberta taxpayers can afford" (p. 2). The "downsize and restructure" philosophy that has been applied to the education system seems to be reflective of the business plan models put forward by writers like Douglas (1993) and Osborne and Gaebler (1993). These authors further articulate a growing need for governments to immediately implement a restructuring plan for education. Shanker (1988), while agreeing that there appears to be vast support for restructuring, notes, "there are probably a dozen or more definitions in circulation" (p. 88).

Governments everywhere seem to be committed to educational restructuring so as to make the best possible use of resources, while at the same time recognizing pressures from global competitiveness, changing demographics, and a greater demand for parental involvement in educational decision making. These pressures have created major inconsistencies for existing and newly formed educational systems. Teacher professional groups like the Alberta Teachers' Association (ATA) are mindful of the changes and have spoken about their concern with the restructuring plan:

Public pressure for major educational reform is building throughout Canada and other countries. Undoubtedly, more change is going to occur. The question is whether teachers as a profession are prepared to take the initiative and to attempt to set the direction for those changes. If we decide not to exercise that initiative, there is little doubt that others will continue to impose their solutions on our classrooms. (ATA, 1993, p. 26)

Over the years, the issue of school district regionalization/amalgamation has been addressed on many occasions in both Canada and the United States. A number of Government Task Forces, Royal Commissions, and Provincial Guidelines have been established to consider the merger and reorganization of school jurisdictions. Many of these reports recommend changes to the existing structures and often call for the consolidation of

existing school districts into larger operating units. But seldom do these reports outline specific issues, processes, procedures, or impacts of the proposed amalgamations.

Educational restructuring has not been limited to Alberta or Canada. In Australia, Anderson (1993) justifies the need for restructuring of the public school system because of the increase in private school enrollment. In the United States, *A Nation At Risk* (National Commission on Excellence in Education, 1983), *A Nation Prepared: Teachers for the 21st Century* (Carnegie Forum on Education and the Economy, 1986), and *Time for Results: The Governors' 1991 Report on Education* (National Governor's Association, 1991) all call for substantial changes and restructuring of education to ensure long term progress and effectiveness. All three reports recommend changes to funding, organizational structure and societal support for quality education. The three reports suggest that unless radical changes occur in the way education is both administered and delivered, the United States may be in jeopardy of losing its economic and technological edge in a rapidly changing world. *A Nation at Risk* (National Commission on Excellence in Education, 1983) opens its campaign for reform by stating, "Our Nation is at risk, our once unchallenged preeminence in commerce, industry, science and technological innovation is being overtaken by competitors throughout the world" (p. 5). Similar concerns have been raised about the Canadian education system.

Since the launch of Sputnik in 1957, education in North America has been working within a framework in which children here are seen to be in competition with children around the world. Koppich and Guthrie (1993) maintain that "tinkering at the educational policy margins would not serve as an adequate springboard to our American economic renaissance" (p. 57). Peters (1996) reinforces this position stating, "Credibility would be restored by a massive, major overhaul of the entire system" (p. 9). The recent structural changes to education in Alberta give rise to additional questions and problems for research. As changes and restructuring occur, it is important that we review and evaluate the processes, procedures, and impacts of these changes. This type of reflective assessment

should be seen as a springboard from which new policy, procedures, and direction can be developed.

Investigating the impact of restructuring education in Alberta will assist the government, policy makers, the public, and practitioners to more fully understand the political, educational, and organizational implications of regionalization and amalgamation. This research provides insight into the changing roles of stakeholders within the new jurisdictions and assesses the process by which organizations successfully cope with substantial structural change. The report of the study thereby adds to the literature on educational reorganization and organizational structure.

Purpose of the Study

In April of 1994, Alberta Education published a *Guide to Regionalization* to assist school boards with implementing the regionalization/amalgamation of school jurisdictions in the province. In the Guiding Principles, the intent of regionalization was stated as, “to create larger, more efficient jurisdictions which will maintain and improve educational opportunities for students” (p. 5). The improvement of educational opportunities for students has often been used as a justification for change.

Chalmers (1978), writing two decades ago, supports this position stating that, “equality of educational opportunity is, and has been used by all provincial governments in Canada as a philosophical justification for any desired change in their educational systems” (p. 259). This assertion was also made by Collins (1961) over a third of a century ago in his analysis of change in the provinces of Alberta, British Columbia, Manitoba, Nova Scotia, and Saskatchewan. The reduction or elimination of educational inequities for students appears to be dependent on three critical elements. The first two include the provision of a consistent basic educational program and the equal distribution of quality professional staff. The third, and maybe most crucial factor, is the provision of fair and equitable funding for all students.

Brown (1968) maintains that quality education is the result of achieving a balance among three interacting values. The suggested variables are, “*diversity*, to permit high-quality programs in districts willing and able to provide them; *equity*, the equalization of educational opportunity to an acceptable level; and *prudence*, in the use of public funds” (p. 3). Any attempt at maximizing one value principle could alter the balance, placing greater emphasis on one or both of the others.

Guthrie (1988) also endorses the position that educational policy is heavily influenced by the opposing yet interconnected interactions of *efficiency*, *equality*, and *liberty* (see Figure 1.1). He asserts that, “. . . concern for each of the dimensions is neither constant across constituencies, calculable in its intensity, nor consistent through time. Periodically, public attention to equality will exceed that for efficiency or liberty and, subsequently, the converse will be the case” (p. 379). Guthrie’s three variables could be placed at the vertices of an ever shifting triangle as represented in Figure 1.1.

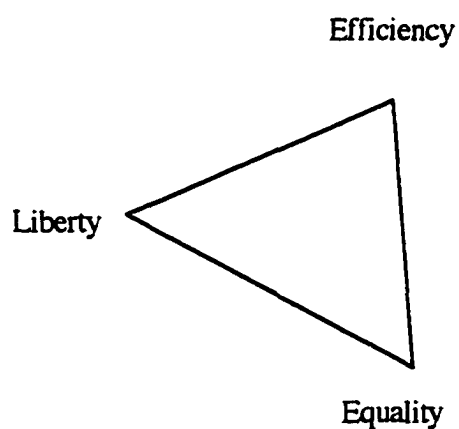


Figure 1.1 Cornerstones of Educational Improvement Efforts

The educational restructuring that has occurred in Alberta has focused on all three of Brown’s value principles and also on all three of Guthrie’s interactive dimensions. Equality relates to the provision of equal allocation of finances for all students regardless of

culture, social standing or geography. Efficiency pertains to the accountability and effective use of finances and other resources as related to education and its contribution to society. Guthrie (1988) further indicates that, ". . . 'liberty' frequently translates to interest in institutional responsiveness and choice among instructional alternatives" (p. 383). In Alberta the liberty dimension seems to be evident in more local control through the implementation of school based decision making, parent councils, home schooling, charter schools, and a variety of alternative educational delivery methods.

Function of the Study

The function of this study was to examine and describe the transformation of a newly restructured school system and to identify the impact of this restructuring on this jurisdiction relevant to the question of school system operations. The investigation was conducted as an interpretive case study, using in-depth analysis. The major research question was:

What impact has restructuring had on the three school jurisdictions that were amalgamated into one regional school division? More specifically, this study addressed questions related to the following thematic areas as identified in the data:

1. Change and the implementation process.
2. The impact of the change on personnel, their jobs, and their responsibilities.
3. Organizational structure, policy, and climate.
4. Coping with the increase in jurisdiction size.
5. The effectiveness and efficiency of the new jurisdiction.
6. The delivery of programs and resources to schools.

Definition of Terms

To ensure consistency and accuracy in the interpretation and understanding of the terminology used in this study, the operational meanings of a number of terms and expressions are provided.

Alberta Education - Prior to 1999, the government department responsible for education in Alberta was called Alberta Education. In 1999, the name of this department was changed to Alberta Learning.

Amalgamation - This term, sometimes used synonymously with *regionalization* in Alberta refers to the voluntary or Ministerial joining or merger of two or more school jurisdictions to form a regional jurisdiction. Jurisdictions that were amalgamated ceased to exist. Amalgamated jurisdictions can establish their own electoral ward system and the newly created jurisdiction cannot be dis-amalgamated through a plebiscite (Alberta Education, Guide to Regionalization, April 21, 1994).

Amalgamated school division - Refers to the resulting school division that was created as a result of amalgamation.

Central office administrators - Includes the superintendent, deputy superintendents, associate superintendents, assistant superintendents, secretary treasurer, and any special consultants who work out of the central or regional office of the district, division or jurisdiction.

Non-operating school district - An identified geographical area that may or may not have had any students residing in its territory, but did not operate any schools.

Regionalization - In Alberta this has been taken to mean the voluntary merger of two or more school jurisdictions to form one newly regionalized school district. The participating jurisdictions become wards of the regional division. Regionalization is reversible. Any time after 4 years, the electorate in any of the participating jurisdictions may petition for a plebiscite to revert back to their previous form of school governance (Alberta Education, Guide to Regionalization, April 21, 1994).

School based administrators - Includes the principal, vice principals, assistant principals, and department heads.

School Board - Refers to the elected governing body of a school district or division.

School division, district or county - These terms, often used interchangeably with school jurisdiction, refer to an identified geographical area that is governed by a school board.

Organization of the Dissertation

The dissertation is divided into seven chapters. Chapter 1 presents an introduction and overview of the study. The chapter examines the (a) need for the study; (b) purpose of the study; and (c) the definition of terms related to the study. Chapter 2 reviews current literature on mergers and amalgamations. This chapter provides insight into the (a) background of amalgamation/regionalization in Alberta; (b) organizational changes in Canada; (c) regionalization/amalgamation perspectives; and (d) board and district size, diversity, and personnel-related issues. Chapter 3 provides a description of, and rationale for, the research methodology used in this qualitative study. Specific reference to, (a) research design; (b) data collection; (c) data analysis; (d) rigor and rationale are presented. Chapters 4, 5, and 6 address the research findings and provide discussions of the findings in relation to the literature. These chapters rely heavily on historical records and interviews held with the participants. Chapter 7 provides an overview of the study, followed by conclusions, discussion and recommendations emerging from the study.

CHAPTER 2

Review of the Literature

The error most theorists make in thinking about organizations is to conceive them as somehow separate from life, love, sex, growth, self, conflict, accomplishment, decay, death, and chance. If we seek to understand the world as people experience it, we come to see that they take the world very much as they find it. Each lives in his own world, but he must deal in that world with others and with the worlds they live in. Organizations come into existence when we talk and act with others. We strive to communicate with these others, to touch them, to understand them and often to control them. In both their doing and their not doing, people make themselves and they make the social realities we call organizations. (Greenfield, 1979, p. 53)

Introduction

As expressed by Greenfield, we are presented with the choice either to remain static or become dynamic in our interpretation of events and processes that fill our daily lives. As change occurs, educators and researchers find themselves in a constant struggle to define the purposes, processes, and structures that relate to education. This is no easy task. Walker and Lambert (1995) suggest, "Education serves not only students and their families but also the social, political, and economic needs of our nation, and so it is influenced by many sources outside the educational sphere" (p. 2). The reorganization of school jurisdictions in Alberta is the result of many forces pressuring the government for action and change. In an attempt to appease the entire sphere of social, political and economic influences, Jonson (Alberta Education, February 24, 1994) announced that, "Education continues to be this government's top priority. This is clearly shown by our four-year target spending reduction of only 12.4%. Quality education will be the foundation of Alberta's future" (p. 2).

The crux of the matter is that, "equal opportunity and equality are tenets held sacrosanct by most citizens of democratic nations" (Redekopp, 1995, p. 25). These convictions, when applied to the education of "our greatest resource," children, imply that regardless of age, gender, geographic location, cultural background, or socioeconomic

status, “our education system will now give every Alberta student access to a quality education” (Alberta Education, February 24, 1994, p. 2). To completely understand the impact of restructuring, a short review of the implementation process is required.

Background to Restructuring School Jurisdictions in Alberta

Section 93 of the Constitution Act, 1867, specifies that, “In and for each Province the Legislature may exclusively make Laws in relation to Education” meaning that jurisdiction, authority, and control over education rests exclusively with the provinces rather than with the federal government. As a result, in the ten provinces and three territories we find 13 different educational systems. While many similarities exist between the systems, each province has its own historical development and legislation to govern its schools.

In the late 1800s, as immigrants and settlers established new roots in Alberta, school districts were established to provide schools for children who were within walking distance from their homes. An increase in population resulted in the establishment of hundreds of small districts, each with its own school, teacher, and school board. The 1935 Government of Alberta Annual Report indicated that there were 3,812 school districts scattered about the province, educating approximately 178,000 students. The realization and need to provide a wider spectrum of services through a broader economic base resulted in the consolidation of many districts. In 1936, a newly elected Social Credit government reduced the number of school districts through “the development of a larger unit of school governance” (Carney & Peters, 1995, p. 249) called the school division. As roads were built and villages became towns, the consolidation and centralization of educational services gained momentum.

However, this did not always result in improved education. As Redekopp (1995) pointed out:

The anticipated economies of consolidation were frequently offset by increased costs for administration and transportation as well as additional costs for teachers,

space, and equipment, all as a result of the growing range of subjects offered at the senior level. However, notable improvements were achieved: larger centralized schools with better equipment, better staffs, and more subject offerings; specialists commuted among schools to teach programs such as French; and counseling and testing services were made available to numerous schools. (p. 26)

Overall, the transformation from the one-room rural school districts into larger consolidated districts resulted in the creation of educational organizations which were seen as more cost and program effective (Economic Service Bulletin, 1994, p. 2).

As reported by Carney and Peters (1995, p. 250), by 1940, some 3,346 school districts had been amalgamated into 103 school divisions or consolidated districts. Ten years later in 1950, in Alberta there were 57 school divisions, and an additional 189 school districts operating outside these divisions. In 1968, educational governance in the Province of Alberta was made up of 60 school divisions and counties and 169 additional jurisdictions. Legislation provided for the existence of public and separate school districts and private schools in the province.

Before the restructuring plan in 1994, there were 141 school boards / jurisdictions in the province (this does not include the two jurisdictions in Lloydminster that are administered by the Province of Saskatchewan or the 3 Francophone Regional Authorities that were established on March 14, 1994 by the Minister). Five of these boards were “non-operating school districts” that did not operate any schools. Reduction in the number of school districts was announced by the Minister in August 1993 and was a calculated move by the Alberta government to reduce unnecessary administrative costs in education by about 13 million dollars (Peters, 1999, p. 86). The Government in its Guide To Regionalization (Alberta Education, April 21, 1994) reaffirmed this position stating, “Albertans believe that reducing the number of boards would result in reduced administrative costs and increased efficiency in the education system” (p. 1). As illustrated in Table 2.1 (adapted from the Alberta Education Guide to Regionalization, 1994), in comparison to the other provinces, and territories, Alberta, with an average of 3,753 students per school jurisdiction, ranked 10th or third lowest in terms of the number of students per school board. The

amalgamation target of 60 jurisdictions set by the Minister would realize an average population per school district in 1996-97 of about 8,176 students. This would place Alberta as the province with the third highest average student population per school jurisdiction in Canada, but still behind Ontario and British Columbia.

A further rationale for the reduction in the number of school jurisdictions was the large number of small jurisdictions. As seen in Table 2.2, in 1994, 46% of Alberta school jurisdictions had fewer than 1,000 students and 86% had fewer than 4,000 students.

Table 2.1 Number of Students per School Jurisdiction in Canada, 1994

Province	Students	Boards	Students/Board
Northwest Territories	17 210	10	1 712
Saskatchewan	208 040	111	1 874
Alberta	547 955	141	3 886
Manitoba	221 821	54	4 108
Newfoundland	120 690	27	4 470
Prince Edward Island	24 420	5	4 884
Yukon	5 970	1	5 970
Quebec	1 149 460	157	7 321
Nova Scotia	170 480	22	7 749
New Brunswick	139 830	18	7 768
British Columbia	646 780	75	8 624
Ontario	2 110 090	172	12 268
Total Canada	5 362 745	798	6 720
Alberta (*1996/97 estimate)	490 550	60	8 176

(*note - estimate is taken from the Alberta Education 92nd Annual Report, 1996/97) (adapted from the Alberta Education Guide to Regionalization, 1994, p. 2)

Prior to 1994, only 20 Alberta school jurisdictions or 14% of the total, had responsibility for more than 4,000 students each.

Discussion and initiative to reduce the number of school boards (from 141 to about 60) had been underway well before the January 1994 announcement. The government invited boards to enter into discussions with adjacent jurisdictions and establish some form of volunteer regionalization (Alberta Education, February 24, 1994). It was also pointed out that failure to accomplish substantial administrative reductions would result in the

Minister acting through the authority of the School Act to amalgamate jurisdictions (Alberta Education, September 8, 1994). Some of the incentives for voluntary regionalization were: (a) partners could be chosen and details worked out by the merging districts instead of the Minister choosing partners and defining details, and (b) regionalization would provide for more organizational stability through the establishment of a ward system within the new jurisdiction. After four years, should the electorate so choose, a ward could withdraw from the new jurisdiction. A 3rd advantage presented was the opportunity to elect a school board, instead of having the Minister appoint an interim board.

Table 2.2 The Size of School Jurisdictions in Alberta, 1994

Students	*Cons.*	City	*District	*Division	PSSD*	RCPSD	RCSSD	Total	%
1-100	1	0	3	0	0	0	3	7	5
101-250	0	0	1	1	0	0	10	12	9
251-500	0	0	4	0	1	0	15	20	14
501-1000	0	4	8	6	1	0	7	26	18
1001-2000	0	10	4	9	0	1	2	26	18
2001-4000	0	10	3	11	0	0	6	30	22
4001-8000	0	4	4	3	0	0	0	11	8
8000+	0	2	4	1	0	0	2	9	6
Total	1	30	31	31	2	1	45	141	100

Note: Cons. - Consolidated School District
 PSSD - Protestant Separate School District
 RCPSD - Roman Catholic Public School District
 RCSSD - Roman Catholic Separate School District
 * - Public Schools

(adapted from the Alberta Education Guide to Regionalization, 1994, p. 1)

In March of 1994, (Alberta Education) with the previously mentioned target of 60 school boards, the Minister made the announcement that would “ensure that the regionalization of boards proceeds in a smooth and timely fashion” (p. 1). Announcement highlights included:

1. A committee of three MLAs had been established to advise and consult with the Minister and to deal with issues arising from the amalgamation process.
2. Alberta Education’s Regional Services Division would coordinate all amalgamation initiatives for the Department.

3. A handbook, "Guide to Regionalization" was to be prepared and distributed in April.
4. A deadline of August 31, 1994 was established for voluntary regionalization.

In the May 11, 1994 issue of the Target Newsletter (Alberta Education), the Minister gave notice that the School Amendment Act, Bill 19 when passed would "allow the province to deal more effectively with regionalization" (p. 3). By the end of July, 1994 (Alberta Education), it was announced that the number of school jurisdictions had voluntarily been reduced from 141 to 109. In September, the Minister announced that:

Overall I have been impressed with the initiative demonstrated by most school boards in negotiating these agreements. However, some school boards have either been unable or unwilling to agree upon a regionalization approach to education governance. Therefore, I will be moving quickly to put in place the necessary amalgamations and regionalizations to obtain our target of about 60 boards. (Alberta Education, September 8, 1994)

As the deadline for voluntary merger passed, the Minister announced (Alberta Education, September 16, 1994) that recommendations were in place that would result in the Province having 57 school boards by January 1, 1995. Although it had appeared that the target of 60 had been exceeded, the 3 Francophone school jurisdictions that were established in March of 1994 rounded off the number of school jurisdictions precisely to the predetermined mark of 60.

Table 2.3 The Size of School Jurisdictions in Alberta, 1995

Students	Cons.	City	District	Division	PSSD	RCPSD	RCSSD	Total	%
1-1000	0	0	0	0	0	0	1	1	2
1001-2000	0	0	0	1	0	0	4	5	9
2001-4000	0	0	0	11	0	0	7	18	31
4001-8000	0	3	0	17	1	0	2	23	40
8000+	0	4	0	4	0	0	2	10	18
Total	0	7	0	33	1	0	16	57	100

Note: 1. There were 57 school boards / jurisdictions in Alberta.
 2. Not included in the total number of school boards (57) are the 3 Francophone Regional authorities that the Minister established on March 14, 1994. These school boards have no lands under their jurisdiction.
 (adapted from the Alberta Education Newsletter, *Target 60*, October 14, 1994)

Table 2.3 shows a considerable reduction in the number of school jurisdictions and an increase in the number of students in each jurisdiction. After amalgamation only one jurisdiction had fewer than 1,000 students. Fewer than half, 42%, had under 4,000 students and 33 jurisdictions, or 58% had responsibility for more than 4,000 students. The average size of a school jurisdiction in Alberta was now over 8,400 students. With the initial objectives met, Minister Jonson stated:

I am very pleased with the process and progress we've made in reducing the administrative overhead in our education system. The coming final steps will allow us to conclude the regionalization and amalgamation of school boards and achieve one of the key goals of our education restructuring plan (Alberta Education, September 16, 1994).

The development of a new organizational map for the province was the first step in the organizational restructuring of education in Alberta. On October 14, 1994 the Minister further announced that:

Alberta's schools will be governed by 57 school boards, down from the 141 that existed in February 1994. With the cooperation and initiative of most school boards, the largest part of the objective to reduce the number of boards in Alberta was reached through voluntary agreements which had reduced the number of school boards in the province to 71 on August 31, 1994 (Alberta Education, October 14, 1994, p. 1).

With the initial implementation task now over, the secondary phase, establishing policy, structure, and governance needed to begin.

School district reorganization in Alberta has never been static. The number and forms of school districts have continually changed. From 3,812 school districts in 1935, to 141 districts in 1993, then 57 by the end of 1994, and 63 in 1998, Alberta style governance relevant to restructuring, amalgamations/regionalizations, mergers and changes will be part of our "ed-scape" well into the future. Not only has educational restructuring affected the Alberta organizational blueprint, but the Canadian scene has also been undergoing rapid change.

Canadian Education: Organizations in Transition

Traditionally, justification for organizational restructuring at both the school and district level “rested on the idea that larger schools and school districts were more equitable and more efficient” (Haller & Monk, 1988, p. 473). Langlois and Scharf (1995) found that demands for increased efficiency and equity of opportunity have prompted the call for further restructuring of the educational system.

Since the 1920s when the number of school districts in Canada reached just over 10,000 separate units (Economic Service Bulletin, 1994), the number of school jurisdictions across Canada has steadily been declining. At the same time, the average number of students per district has been growing. Between 1965 and 1997, the number of school districts in Canada declined by about 95% and the number of students per district increased by over 2,000%.

Table 2.4 Canadian School Districts and Enrollments

Year	Number of Districts	Enrollment	Students per District
1965-66	6,430	4 695 243	730
1971-72	2,822	5 645 310	2 000
1981-82	987	4 785 384	4 848
1991-92	864	4 934 063	5 710
1993-94	783	5 077 435	6 485
1996-97	350*	5 594 900**	15 985

(adapted from the Economic Service Bulletin, 1994, p. 4)

(* Peters, 1997, p. 4, estimate)

(** Statistics Canada estimate, 1998, On Line)

With continued public demands placed on governments to become more effective, efficient, and responsive, the move to consolidate and reorganize school districts has been occurring at an ever-increasing pace. This “drastic reduction in the number of units of local government for education has been one of the most dramatic of

all changes in Canada's pattern of government" (Economic Service Bulletin, 1994, p. 1). Because of the exclusive control over education provided to each province by Section 93 of the Constitution Act (1867), each province has developed organizational structures that presumably are best-designed to meet the needs and requirements of their particular population and region.

The restructuring movement across Canada appears to mean different things to different people. Lawton (1992) suggested that restructuring is:

A reorganization that replaces central planning, control and supervision with a deregulated, decentralized system in which the "bottom line" counts most. In practice, educational restructuring is associated with notions such as school-site management, school-based management, school-based budgeting and the local management of schools. (p. 139)

Tyack and Cuban (1995) indicated that:

People regard restructuring as a synonym for the market mechanism of choice, or teacher professionalization and empowerment, or decentralization and school site management, or increased involvement of the parents in their children's education, or national standards in curriculum with tests to match, or deregulation, or new forms of accountability, or basic changes in curriculum and instruction, or some or all of these in combination. (p. 80)

Peters (1997) reported that:

In Canada, in some of our provinces, restructuring has included all of these facets with greater emphasis on some areas than on others. And in many instances it has clearly been about changing the structures, with little or no clear link to the improvement of teaching or learning although the political rhetoric accompanying the changes suggests that such a link exists and indeed drives the push for the changes. (p. 17)

Kachur's (1999) viewpoint on the Alberta Government perspective on restructuring education was, "Quite simply the government promoted 'doing more with less' as if it were a natural need" (p. 62).

Whatever the plan or outcome, the current educational structure that is evolving in each province portrays the divergent nature associated with resolving issues related to equity, efficiency, and liberty (Guthrie, 1988).

Newfoundland

Since 1843, Newfoundland has provided educational services to its students through a publicly funded denominational system. In 1949, when Newfoundland joined Canada, the province operated four education systems that were divided into 27 school districts, administered by recognized religious denominations: Roman Catholic, Anglican, Salvation Army, and the United Church of Canada (Economic Service Bulletin, 1994, pp. 5-6). Subsequently, the Seventh Day Adventists and the Pentecostal Assemblies became recognized by the province bringing the total to six denominations. The Economic Service Bulletin (1994) reported that:

In 1965-66, there were 232 denominational school boards and another 38 boards for the administration of amalgamated schools. Only 22 of these 270 boards served 1,000 pupils or more. At the time of integration in 1969, the existing 270 boards were consolidated into 37, of which 20 were Integrated, 15 Roman Catholic, one Pentecostal, and one Seventh Day Adventist. (p. 6)

On November 1, 1995 the Newfoundland House of Assembly passed legislation that would remove the church's century old domination from the governance and administration of the province's educational system. "What the government proposed by way of amendment was a major revision to Term 17 of the Terms of Union with Canada. The amendment, in effect would remove the churches from their position of control over the schools of the province" (Peters, 1997, p. 14). On May 31, 1996 the proposed amendment was introduced in the House of Commons.

Debate continued for two days, and in a free vote on June 3 the motion was carried. On Thursday, June 6, the amendment was introduced in the Senate and, following lengthy and thorough debate, was approved in an amended form on November 27, 1996. . . . However, on December 4, 1996, the House of Commons again revisited the proposal, defeating the Senate amendment and approved, unamended, the revised Term 17 which had been submitted by the Newfoundland government. The way was opened to the Newfoundland government to restructure its educational system in accordance with its own political, fiscal and educational agendas and without the restrictions of having to deal with denominational councils which in the past, had limited the government's autonomy in dealing with educational problems. (Peters, 1997, pp. 13 - 14)

Based on the recommendations of the *Williams Royal Commission* (1992) and subsequent Constitutional changes in the way schools were organized and operated

under religious lines, the government moved ahead with its plan in December of 1996 to reorganize the 27 denominational school districts into 10 interdenominational divisions governed by publicly elected school boards (Ontario Ministry of Education and Training, 1997).

Prince Edward Island

The implementation of a new School Act in 1971, replaced the existing educational structure in PEI that consisted of 300 schools and more than 200 school boards with 5 large educational units, 4 anglophone and 1 francophone. (Economic Service Bulletin, 1994, p. 7). A more recent government-initiated review prompted the government to pass legislation in 1994 reducing the number of school jurisdictions to 2 anglophone jurisdictions and 1 francophone jurisdiction. The anglophone districts virtually divide the province in half with the eastern area comprising approximately 8 000 students and the western area about 16 000 students. The francophone district encompasses the entire province with just over 600 students governed by 9 elected trustees. The anglophone boards each have 15 trustees (Manitoba School Divisions/Districts Boundaries Commission, 1994).

Nova Scotia

The Education Act of 1864, among other things, created nearly 2,000 local school authorities in the Province of Nova Scotia. By 1940, “under this system of administration, 8,000 elected or appointed school officials were administering the work of fewer than 4,000 teachers” (Economic Service Bulletin, 1994, pp. 7-8). Between 1942 and 1946, then again in 1970, the province, through financial incentives, encouraged the further consolidation and reduction of school districts. In 1981, under recommendations of the *Report of the Commission on Public Education Finance*, (The Walker Report), Nova Scotia reduced the number of school divisions from 85 to 21

anglophone jurisdictions and 1 francophone jurisdiction (Economic Service Bulletin, 1994, p. 8). In 1994 another review of the education system was conducted, further restructuring education and again reducing the number of school boards into, “6 regional boards, and one province-wide board for Acadian and Francophone education” (Ontario Ministry of Education and Training, 1997).

New Brunswick

In 1967, a government move to reorganize and consolidate school jurisdictions reduced the number of school districts from 422 to 33. During the 1970s a number of separate unilingual boards began to develop and in 1992 the existing 42 school districts were reduced to 18 (Economic Service Bulletin, 1994, p. 8). In 1996 the 18 existing school boards were eliminated and now the operation of the education system is administered in the following way:

- eighteen school district boundaries remain with operations managed by eight superintendents.
- the eight superintendents are advised by 18 district councils which have veto power over the hiring of principals and teachers.
- the province sets policies and standards, with advice from two provincial advisory boards (English and French) representing the 18 districts. (Ontario Ministry of Education and Training, 1997)

Quebec

Prior to 1992 the province of Quebec had over 200 religious school boards operating and managing its schools. Following a 1992 reorganization of school districts, that number was reduced to 156 through the integration of elementary and secondary boards of education. “On June 17, 1993, the Supreme Court of Canada ruled constitutional the section of the proposed Education Act which would create linguistic school boards” (Economic Service Bulletin, 1994, p. 9). The government now had the authority to proceed with its plan “to create denominationally neutral linguistic school boards” (Economic Service Bulletin, 1994, p. 9). On July 1, 1998 these 156 religious school boards were replaced with, “69 new linguistic boards - 60

francophone, nine anglophone” (Globe & Mail, June 16, 1998, p. A3). This reorganization of school boards as reported by the Globe and Mail may give rise to two major concerns: “curriculum reform and the religious status of individual schools.”

Major revisions to the curriculum are being planned by the department of education which will be implemented by local boards. The second, and more politically sensitive issue relates to the principle that, “School boards will be secular but each will get to determine whether to be non-denominational or remain Catholic or Protestant” (Globe & Mail, June 16, 1998, p. A3).

Ontario

At one point in its history, the province of Ontario had over 5,700 school districts, many consisting of single, one-room schools. These were reduced to more than 3,200, and in 1964, provincial legislation further reduced the number of districts to about 1,670. By 1969 additional reorganization and consolidation brought the total number of operating school boards to 192 (Economic Service Bulletin, 1994, p. 10). In January 1997, the Ontario Education and Training Minister, John Snobelen announced that, “based on extensive consultation with the people of this province that has involved 24 separate reviews on finance and governance since 1950, including 2 Royal Commissions, 10 commissions and committees, 2 fact-finding reports, 2 panels and innumerable meetings” (p. 2), effective January 1, 1998 the *Fewer School Boards Act* would come into effect. Snobelen further stated that, “The number of major school boards in Ontario will be cut in half from 129 to 66 and replaced by new ‘District’ school boards effective January 1, 1998. Wherever possible, the District boards will follow municipal boundaries.” He also explained, “After this reform, the province will have 55 English language school boards, down from 125; and 11 French-language school boards, which will replace the confusing array of 4 existing boards, 59 sections of boards and 8 advisory committees” (p. 2). This 50% reduction in the number of

school boards resulted in the reduction of school trustees from “almost 1,900 to approximately 700” (p. 2), a significant 60% decline in the number of locally elected school trustees.

Manitoba

The Manitoba School Divisions/Districts Boundaries Commission (1994) introduced their review by stating:

Local schools and school districts represent one of the first public services organized by our pioneers. They recognized the importance of education as an integral part of the early community. By 1959, when the last major transformation of school division boundaries was initiated there were 1,777 districts in operation in Manitoba. (p. 1)

Since that time Manitoba has established 3 Royal Commissions to review issues related to the organization, finance, governance, and services relative to education (Economic Service Bulletin, 1994, p. 11). In 1994, the Manitoba School Divisions/Districts Boundaries Commission was established to review the divisional boundaries in the province. The Commission’s recommendations resulted in the reduction of the existing 57 school divisions and districts to 21 school jurisdictions.

Saskatchewan

When Saskatchewan became a province in 1905, there were 206 school districts, most of them rural, scattered across the province. In 1906, a year after the establishment of the Department of Education, the number of school districts was increased to a total of 1,190. Subsequently, in 1913, a provision was made for consolidated school districts (Economic Service Bulletin, 1994, p. 12). However the number of districts continued to grow. In 1944, the *Larger School Units Act* was passed reducing the number of operating boards from over 5,000 to approximately 120. By the early 1990s, there were a total of 111 school districts of which 91 were public and 20 were separate. In 1992 the Saskatchewan School Trustees Association

conducted a study that recommended reducing the number of public school districts to 35. It further suggested that jurisdictions have enrollments of between 2,500 and 5,000 students. (Economic Service Bulletin, 1994, p. 12). In December 1996, the government announced further plans for the “voluntary” restructuring of school divisions. As of 1997 the province had 119 operating school boards (Ontario Ministry of Education and Training, 1997).

British Columbia

In 1945, the *Cameron Commission Report* recommended that the 800 existing school districts be condensed into 74 larger units. The British Columbia Teachers’ Federation explains that over the years, “British Columbia proceeded with the plan and now has only larger school districts which include various combinations of villages, cities, district municipalities, rural school districts, consolidated school districts and those areas of the province which were previously unorganized territories” (Economic Service Bulletin, 1994, pp. 13-14). The result of the re-organization was the creation of a structure consisting of 75 school boards. In 1993 the government established the Task Force on Efficiency and Effectiveness in School District Governance (*Korbin Commission*). The mandate of the task force was to prepare an amalgamation and service sharing plan (Manitoba School Divisions/Districts Boundaries Commission, 1994). As an outcome of the task force recommendations, British Columbia has reduced the number of school boards from 75 to 57 (Ontario Ministry of Education and Training, 1997).

The above information pertaining to the status of provincial restructuring was summarized from the Saskatchewan School Trustees’ Association Report (1994), the Manitoba School Divisions/Districts Boundaries Commission (1994), the Economic Service Bulletin (1994), and the Ontario Ministry of Education and Training background information release (1997).

In its analysis of the restructuring of education jurisdictions in Canada's provinces, the Saskatchewan School Trustees' Association (1994) surmised that:

The general trends in recent years have been to reduce the number of school boards, to enhance school-based governance, and to centralize financial controls. At the same time, provincial governments appear to support local lay control of education and the continuation of elected single-purpose school boards. Expenditures reduction, fiscal equity, and educational improvements are the primary reasons given for governance restructuring. (p. 4)

Regionalization/Amalgamation Perspectives

Over the course of history, the education system in Canada has continuously changed. Just as innovation has affected the delivery of education in the classroom, change has also affected the delivery of administrative services and the boundaries related to these fluid organizational units. As Hitt, Keats, Harback, and Nixon (1994) point out, with the ever-changing dynamics of education in Canada, an increasing response is to engage in some form of "rightsizing." The Manitoba School Divisions/Districts Boundaries Commission (1994) supports this position by stating, "Since 1990 ten provinces and territories have been reviewing or have reviewed and are now in the process of implementing changes to their division / district boundaries" (p. 21). Researching the Canadian scene provides confirmation that review and change of the organizational map-scape is an ongoing process.

Governments have established numerous task forces and royal commissions to address direction and concerns, including the Royal Commission on Education in Ontario (1950), the Royal Commission on Rural Education in Saskatchewan (1956), the Royal Commission on Education in Manitoba (1959), the Royal Commission on Education in Alberta: The Cameron Report (1960), the Royal Commission on Education in Newfoundland (1992), the Task Force on Educational Governance in Saskatchewan (1993), and the Manitoba School Divisions/Districts Boundaries Review Commission (1994). Most of these reports recommend the amalgamation of existing smaller school jurisdictions into larger administrative units, but seldom do they outline

specific procedures or structures. In response to some of these studies a number of researchers have provided various viewpoints on the issues and effects of amalgamation.

Guthrie (1980) in an analysis of school and school district consolidation, found that prior to 1970, consolidation improved the quality of education and reduced costs. He further found that after 1970, consolidation appeared to have had either no impact or a negative impact on educational quality. Cost savings were found to be negligible.

Davis (1986) in his critique of New York State amalgamations found that cost savings and program enhancement could be realized through the amalgamation of school jurisdictions, but any positive implications could only be evaluated on an individual case basis, and generalizability was limited.

A similar conclusion was reached by Alexander (1990) in his study of hospital board mergers. He reported that:

Indeed, there is probably no one best governance model appropriate for all hospitals. Rather, each hospital must consider its particular situation in terms of its mission, stage of development, fiscal position, and environment before deciding what, if any, modifications to its governing board are required and feasible. (p. 28)

Erickson (1994) in his review of four American school district consolidations found no significant benefit to amalgamation and Tattersall (1994) in a review of literature on corporate downsizing and restructuring stressed that sufficient planning, communication, and consultation must take place to enhance results and outcomes.

Hall (1994), Sharpe (1989), and Shepherd (1988) in their respective analysis of amalgamation in Saskatchewan, Prince Edward Island, and Manitoba found a general and widespread dissatisfaction among constituents with their lack of participation in amalgamation discussions. They further found that the potential loss of identity was seen as a serious threat to small communities embroiled in the amalgamation debate.

Galvin (1986) in his investigation of New York State school district reorganization, found evidence that linked reorganization to the loss of community identity, but also discovered that, "The decision to reject the reorganization bid appeared to have less to do with the issues of community identity and more to do with the costs and benefits of the opportunities" (p. 79). It appeared that community members, although recognizing certain advantages to amalgamation sometimes chose not to support the move to amalgamate because they saw very little academic and resource benefit for their children related to the transformation.

The American Association of School Administrators' (AASA) commissioned report on school district reorganization (1965) found similar fears related to amalgamation. In their words:

The crux of the matter is that if sound school district reorganization is to be effected through the expression of the free will of the people, the people themselves must be so firmly convinced of its advantages that they are willing to give it priority over their personal interests, concerns, prejudices, and fears. (p. 11)

The AASA also found that resistance to the reorganization of school districts was expressed as a result of the following fears:

1. Local control of school decisions would be lost.
2. School taxes would increase and the level of service and programs decrease.
3. Parental influence on educational decisions would decrease.
4. The close relationship between the parents and the school would be lost.
5. The local school would close.

The community itself would be seriously affected or destroyed.

The AASA further emphasized that:

School districts are indigenous to the history and life of the people. People identify themselves by reference to school districts, and at times this kind of identification has more meaning than identification with civil districts or units. A proposal for the reorganization of a school district constitutes a change in the historical evolution of that district. (p. 22)

The Ontario Public School Board's Association (OPSBA) in their February 1995 review of the proposed amalgamation in the Windsor-Essex area outlined a number of additional significant issues. System administration cost savings were perceived to be negligible as were over-all cost savings. If any savings were to be realized through the amalgamation process, the start-up and implementation costs appeared to greatly outweigh these savings. The study also indicated that some efficiencies might be realized through the consolidation of programs including transportation, library services, curriculum development, technology, and special education services. The review concluded by stating:

It is apparent that school board amalgamation is not a 'blanket' solution for saving money. As it is a highly complex exercise, it is a solution that the province cannot impose on communities. There may be other avenues for cost-savings that need to be explored that could result in greater returns, such as legislative and regulatory changes for greater flexibility and for restructuring education delivery. (p. 6)

A second report by the OPSBA in September of 1995, outlined alternatives to amalgamation and further outlined a number of critical issues that needed to be addressed if amalgamation were to proceed and be successful. Issues revolve around cost, personnel, benefits to students, community participation, and school boards. The report stressed that communities and their constituents must play an active role in the process and should not be disenfranchised from maintaining their community identity.

The subsequent recommendations made in the Ontario School Board Reduction Task Force (OSBRTF) Final Report (1996) disagreed with the OPSBA position. The OSBRTF Task Force supported the overall reduction of school boards in Ontario through the process of amalgamation and provided the following statements as rationale:

The task force agrees that education finance reform is vital; indeed, we maintain here, as we did in our Interim Report, that reform of education governance cannot take place without reform of education finance. We also believe there is a need to reduce the administrative bureaucracy of some boards. There are clear cost savings attached to reducing the number of trustees and supervisory staff, and the administrative structures supporting them. There are also identifiable savings from cooperatives and consortia between neighboring school boards.

The province has seen little willingness, though, on the part of most boards to capitalize on these opportunities for savings. We have therefore concluded that the structural changes associated with amalgamation are necessary to realize savings in school board governance and administration. A major force behind the establishment of this task force and the design of its mandate was the need, in view of the province's fiscal circumstances, to redirect scarce education dollars from non-classroom activities to classrooms. Amalgamation will help achieve that goal if it occurs in conjunction with other reforms, including changes recommended in this report. (p. 9)

Given the conflicting recommendations of the two reports, the decision facing the government was not an easy one. As mentioned earlier in the chapter, Education Minister Snobelen (1997) announced that the number of school boards in Ontario would be reduced from 129 to 66 and the number of school trustees would be reduced from about 1900 to approximately 700. Amalgamation of school districts was in full swing.

Not only have public school districts merged but so too have colleges and universities. Many of the same problems and concerns exist within the post secondary realm as in the public education domain. Issues relating to Guthrie's (1988) interconnected dimensions of efficiency, equality, and liberty are continuously being questioned and challenged. Brueder (1989) pointed out that in today's competitive marketplace:

. . . colleges and universities are competing for a shrinking high school graduate pool; operating on limited state and federal tax dollars; limited by more conservative community reaction to growth, whether related to budget, physical plant, or human resources; and being forced to choose and better define their programs and services. Collaboration and coordination among colleges is incrementally replacing competition and contention."(p. 37)

Denemark (1983) outlined five supporting responses associated with declining resources in teacher colleges:

1. Reduction in courses and program requirements.
2. Administrative reorganization.
3. Faculty redevelopment for changed work assignment.
4. Collaboration with other institutions.
5. Program reduction or discontinuation.

As the public demands more variety and better quality programs at a reduced cost, both public education and colleges need to find innovative ways to meet these requests. Amalgamations appear to be one solution.

Gamage (1992) in a review of the voluntary amalgamation of La Trobe University and the Lincoln Institute of Health Sciences found that after some initial merger problems the union has been very successful. Success is attributed to a number of factors. The fact that discussions and negotiations took six years to complete provided both institutions with the time and opportunity to set goals, plan, implement and adjust. Strong leadership with a sense of vision and a commitment to continued communication assisted in the success of the merger. Chambers (1983), in discussing successful mergers adds that amalgamations need to occur between friends who have similar visions of the future. Time must be taken to debate, discuss, and resolve issues. In his words, "College merger requires investment, knowledge, dexterity, luck, wisdom, and the courage to be consumed for the sake of a better future" (p. 17).

Barr's (1985) examination of the merger between Oregon State University and Western Oregon State College also found a need to plan, discuss and combine strengths when undergoing amalgamation. The positive implications of the merger were many. Rather than worrying about reductions and possible closure, the merger provided a sense of stability and control. By combining resources and visions for the future, a new dynamic social structure emerged. Significant financial savings resulted from the amalgamation and staff were allowed greater scope and opportunity in program and movement. Despite a general reduction of budgets, program quality was maintained. This is not to say that the merger was without obstacles. During the two year amalgamation process a number of problems arose. The merger appeared to consume most of the faculty and administration energy and creativity. The administrative and organizational structure was in a state of confusion and needed to be restructured many times. With organizational problems came an increase in bureaucratic complexity.

Responsibility and accountability relating to job roles came into question. Decision making often came to a stand still and communication with both internal and external stakeholders became extremely difficult.

In summary, the research shows that attempts to merge educational organizations has been met with both success and failure. For successful educational restructuring to occur, adequate planning and communication must take place before the implementation process begins. Issues related to need, cost, process, and benefit must be reviewed by all stake-holders.

Restructuring in the Corporate World

Whether described as a merger (Brueder, 1989; Gamage, 1992; Napier, 1989; Pritchett, 1987), consolidation (Monk & Haller, 1986), amalgamation (Meek & O'Neill, 1988; Nance & Fawns, 1991), reengineering (Keidel, 1994; Nahavandi & Aranda, 1994), downsizing (Stoten, 1989; Tomasko, 1990; White, 1992) or rightsizing (Hitt, Keats, Harback, & Nixon, 1994), organizational restructuring (Keidel, 1994; Markides, 1995; Singh, 1993) has become common practice in today's private and public sectors.

While it appears that restructuring has been a constant variable in the organizational change process, it is a relatively new term coined by the business world to define significant and rapid changes in a firm's assets, capital structure and management (Singh, 1993; Bowman & Singh, 1989). Dranove and Shanley (1995, p. 55) suggested that, "the strategic rationale for a merger is to exploit economies of scale and scope." Humpal (1971, p. 103) defines merger as "an event of organizational change wherein the object of change is to create one system from two or more previously distinct entities." Gamage (1992) provided a more comprehensive interpretation:

The term merger or amalgamation is used to represent any situation in which assets and liabilities are legally consolidated or in which the combination of two or more organizations results in the transfer of managerial prerogatives to a single governing body. (p. 73)

Bolman and Deal (1991) view restructuring as, “one of the most common approaches to organizational change, despite the fact that all reorganizations produce disruptions and many never produce long-run benefits that justify the short-term costs” (p. 99). Bolman and Deal (1991) further stated that restructuring, “is like spring cleaning: We accumulate debris over months or years, and finally we have to face up to the mess” (p. 95). The changes that cause us to begin spring cleaning, they add, may be environmental, technological, organizational growth or decline, political climate, and/or changes to the leadership in the organization (Bolman & Deal, 1991). The timing, and dynamics of reorganization are dependent on a number of internal and external variables. Singh (1993) suggested that:

The principal difference between the current merger wave and the previous ones is of scale: the target for takeover has often been the large corporation, and the rationale advanced for many transactions is the search for greater efficiency through downsizing the firm. (p. 149)

As the world gets smaller and organizations get bigger, traditional responses are proving to be inadequate in solving today’s organizational challenges (Nevis, Lancourt & Vassallo, 1996). According to Wotherspoon (1991) the need for many organizations to make difficult restructuring decisions is caused by, “the rapid diffusion of new technology, privatization of public services, deregulation and the new free trade environment” (p. 20). Organizations are being challenged to escape their “psychic prison” (Bolman & Deal, 1991, p. 4) and begin to make major shifts in their belief systems created from long established mental models and paradigms (Senge, 1990).

The new direction as set out by the Guide to Regionalization (1994, p. 5) endorsed this shift in thinking, by stating that the object of regionalization in Alberta was to “. . . create larger, more efficient jurisdictions which will maintain and improve educational opportunities for students.” The Alberta government’s plan to change the

education front also included the reduction of school jurisdictions by nearly 60% and the downsizing of Alberta Education by 20% (Alberta Education, February 24, 1994).

By its very definition, downsizing was viewed by Tomasko (1992) as, “an agonizing painful process, an emotional ‘hot potato’ that most companies try to get behind them as quickly as possible” (p. 13). Yet, whether through need or trend, large numbers of corporations have and are reorganizing. Cameron and Cheek (1991) suggest that very few large organizations have escaped work force reductions and restructuring. Lewis (1990) and the *Wall Street Journal* (1985, p. 1) estimate that nearly half of North America’s largest corporations restructured in some capacity during the 1980’s. Lichtenberg (1990), Markides (1990), and Porter (1987) also provided evidence that a significant proportion of major firms in the United States have restructured through corporate refocusing in the 1980’s. Markides (1993) supported these findings by stating that between 20 and 50 percent of the Fortune 500 firms refocused during the 1980’s as compared to only about 1 percent in the 1960’s. Porter (1987) further suggested that over 50% of small Canadian firms that were acquired in the 1960s and 1970s by larger corporations, have since been divested. Khemani (1991) indicated that the total number of acquisitions and mergers in Canada during the decade between 1979 and 1989 rose almost 100% from 511 to 1,091. Of this total, 691 were foreign acquisitions and mergers and the remaining 400 were domestic. In a 1991 international survey of 1,005 organizations (False Economies) it was reported that less than half of the companies surveyed succeeded in meeting their cost-reduction targets. A majority of the companies also reported “nasty side effects” such as poor morale and loss of valued employees as a result of the downsizing.

The media are regularly replete with stories of businesses electing to merge. The Canadian Press (1999) explored the viability of Canadian banks merging and in a separate article discussed the merger of Atlantic Canada’s four telephone companies.

Lapham (1998, p. 8) cited multiple examples of corporate mergers including:

April 6, 1998, Citicorp Bank and Travelers Group Insurance; April 13, 1998, National Bank Corporation and The BankAmerica Corporation; May 7, 1998, Daimler-Benz and Chrysler Corporation; and May 17, 1998, The Seagram Company and PolyGram. He further stated that, “by mid-May the New York Times was reporting the aggregate sum of the year’s announced 444 mergers and/or acquisitions at \$630 billion” (p. 8). So why are companies wanting to become bigger and merging at such an accelerated rate?

Brueder (1989) contended it was, “an attempt to better serve their customers through expanded technical capacity, increased services, and a stronger human resource pool” (p. 37). A decade later, Lapham (1998) stated that it might be because:

The cold war had come safely to an end, and yes, the deregulation of the global economy has bestowed upon the consuming public any number of precious boons, but the new economic order also had spawned the birth of monsters rising like Godzilla from the sea of alien debt, and how was a company supposed to stay in business, much less afford what the publicists call ‘a global presence,’ unless it transformed itself into Daisy the elephant or maybe into one of those giant robots, mechanical and all-devouring, that clank across the landscape of a George Lucas movie? (p. 8)

This turbulent disruption on organizational structure has created a paradigm that consistently challenges the established frameworks within the organization. Macro-environmental factors have compelled organizations to seek creative alternatives that reframe tensions and necessitate the need for cooperation, collaboration, and flexible networking. Serieyx (1993, p. 14) called this transformation the “organizational big bang.”

The massive explosion we are seeing in both business and education is “restructuring.” Fullan (1991) interpreted organizational change as a process that is multidimensional; a non linear event, in which occurrences from one phase can impact and work through previous and subsequent phases constituting a continuum of actions and results. Bridges (1986) stated that, “Organizational change is structural, economic, technical, or demographic, and it can be planned and managed on a ...rational model...” (p. 25).

With the ever changing competitiveness of the global marketplace, mergers and restructuring have often been chronicled as necessary for initiating corporate renewal and survival (Jensen, 1988; Lubatkin, 1987). Others have questioned the tradeoffs involved in asset redeployment and organizational leverage as opposed to creating work and profits (Porter, 1987). The debate as to whether certain types of corporate restructuring enhance or hinder corporate development and profit making has become a critical issue, as many U.S. companies begin to lose market shares to global competitors (Franko, 1989; Hamel & Prahalad, 1989). The profit and positive economies which downsizing are meant to achieve are rarely accomplished and Tomasko (1992) goes as far as suggesting that most downsizings fail.

Lei and Hitt (1995) maintain that, "the empirical evidence regarding the effects of corporate restructurings on competitive advantage and development of new skills and capabilities is mixed" (p. 836). Although many corporate mergers and restructurings have increased profits and share values (Jensen, 1988; Lubatkin, 1987; Singh & Montgomery, 1987) others have not been able to sustain growth and profitability (Hopkins, 1987). It is further suggested that mergers and acquisitions of corporate related organizations increase the level of profitability and success (Barton, 1988; Lubatkin, 1987; Singh & Montgomery, 1987). Others indicated that massive restructuring, boundless acquisitions, and extensive diversification dull a company's capacity to be innovative and reduce its ability to maintain rudimentary business decisions by directing management's focus away from core corporate decisions (Franko, 1989; Peters & Waterman, 1982). Peters and Waterman (1982) and Porter (1987) also suggested that corporations extensively involved in restructuring are usually unable to reorganize and establish a long term competitive advantage. This may be as a result of managers spending more time on merger process and market positioning than on corporate unit sharing and interrelationships, communication, research and development, and maintaining customers. Nevin (1989) explained that the

success of the Bridgestone-Firestone merger in 1988 was a direct result of communicating the right attitude about the combination. “I think that attitude has been communicated not just to me, but to the six levels of management in the company” (p. 30).

Lei and Hitt (1995) found that after reorganization, managers become more averse to taking risks based on perceived threats related to further change, personnel cuts, and management error. These managers also imposed strong financial constraints on the organization, limiting the ability to foster new growth and development. Often managerial turnover dilutes corporate memory and the firm’s overall focus. As mergers create larger and more diverse corporations, “their corporate management teams may be less knowledgeable of the industry and market characteristics unique to each business unit. As the acquiring firm becomes more diversified, the dominant core business becomes less salient in future strategies” (Lei & Hitt, 1995, p. 843). This may account for a reduction in human capital development, research and development and technological improvements (Biggadike, 1979; Porter, 1987). Franko (1989) maintained that the only measure of a corporation’s competitiveness is its ability to invest and develop new technologies. Successful managers “. . . will require high levels of personal artistry to respond to challenge, ambiguity, and paradox” (Bolman & Deal, 1991, p. 446). Bolman and Deal (1991) further indicate that to enhance leadership effectiveness, “structural leaders can become great social architects who build an analysis of an organization’s environment and its capacities into a powerful structure and strategy” (p. 444). Prahalad and Hamel (1994) stated that:

Rapid industry transformations, in new and unfamiliar directions, require that managers learn to change the dominant logic and the recipes that they have grown up with. What used to be the basis for a policy that enabled a firm to be successful may turn out to be the orthodoxy that stifles the ability of that firm to decode and anticipate the nature of changes taking place and adapt. Rethinking managerial frames in large firms is an important issue for strategists. (p. 9)

Luce (1983), Tomasko (1990), and Stoten (1989) agreed that organizational planning and restructuring should not be an agent used solely in poor economic times but recognized as an ongoing corporate activity utilized for continuous improvement.

The challenges facing corporate restructuring are diverse. The phenomenon is complex and multifaceted. Research has found, that when it comes to determining the success of mergers, each case needs to be independently reviewed. Generalizing on the issues, Shapiro (1993) commented that, “there is considerable controversy surrounding both the determinants and effects of mergers and acquisitions. The empirical evidence has to date not resolved the outstanding issues” (p. 21).

Board Size and Diversity

The reduction in the number of school jurisdictions in Alberta greatly reduced the number of locally elected school trustees across the province. The reduction in the number of boards and their subsequent size, had a profound effect on how they dealt with consolidation and organizational change. As school boards evolved from small localized units to larger representative bodies, research has focused on the structure and function of these boards.

Resource dependence theorists (Mintzberg, 1983; Pearce & Zahra, 1992; Pfeffer, 1972, 1973) tend to emphasize the institutional function of board structure. By increasing the size and responsibilities of a board, links to resources and the external environment are perceived to be increased. Having a larger, more diverse board allows for greater participation from a wider range of public sectors. Williamson (1975) and Kosnik (1987, 1990) moved away from an emphasis on resources to a focus on governance. They viewed boards as the intermediary between organizational action and the implementation of stakeholder interests. Kosnik (1987) and Singh and Harianto (1989) further found that the more representative of the community a board could be, the greater the likelihood that the board would be more objective and independent in its

decision making. The third aspect that can influence a board is the effect of structure on strategic function. The strategic function involves making important decisions that will assist the organization in adapting to changes in the environment, organizational performance and structural change (Boulton, 1978; Mintzberg, 1983; Pearce & Zahra, 1992; Zald, 1969). Boeker, Gautam and Goodstein (1994) claimed that, "The increased interest in the board's strategic role raises the issue of potential conflict between the strategic function of the board and its institutional and governance functions" (p. 242). Boeker et al. further indicated that, "as boards increase in size and diversity to fulfill their institutional and governance functions, they may not be ideally suited to taking timely strategic action in response to critical environmental changes" (p. 242).

Expanding their size provides the opportunity for boards to enhance many of their strategic functions. Pfeffer (1972, 1973) reported that larger boards can make available an increased pool of expertise and resources for the organization. Larger boards can also enhance organizational performance by providing a variety of perspectives related to corporate strategy (Pearce & Zahra, 1992). This non-monolithic approach guards boards against the Pygmalion effect where differences in theory can become differences in reality (Rosenthal & Jacobson, 1968).

On the negative side, Kovner (1990) and Alexander, et al's. (1988) study of hospital boards indicated that large boards can often preclude effective decision making by extending the decision making process and diffusing individual board commitment. On the other hand, in a different study, Alexander (1990) found that small boards:

May result in the board making more decisions involving risk and increase the strategic orientation of the board. The board is willing to accept risk when fewer individuals and interests have to be taken into account in the decision making process. (p. 4)

Alexander (1990) went on to say that hospital board size has "showed no appreciable change between 1985 and 1989" (p. 4). This size consistency during times of downsizing may be attributed to, "the increasing organizational complexity of most

hospitals, usually resulting from corporate restructuring and/or diversification, may serve to keep boards large as managers and board members from newly related organizations seek representation on hospital boards” (Alexander, 1990, p. 5). An additional benefit resulting from an increase in board size is the enhancement of organizational governance by reducing CEO domination and alliance building (Singh & Harianto, 1989).

Although research has found considerable advantages to increasing the size of boards, there is significant evidence to indicate that an increase in size can also inhibit a board’s ability to function effectively. Large boards often face numerous barriers related to cohesiveness and consensus (Shaw, 1981) and further experience reduced levels of board member motivation and satisfaction due to the lack of participation that is characterized by larger decision making bodies (Jewell & Reitz, 1981). Larger boards often become less involved in strategic decision making (Judge & Zeithaml, 1992) and because of their size the number of interactions, factions, coalitions, and conflicts could potentially increase (O’Reilly, Caldwell, & Barnett, 1989). Large, complex, and ambiguous issues are not usually handled well because of large group dynamics (Olson, 1982) and, “as complexity and ambiguity increase, groups may become factionalized into special interests. These special interests may attempt to promote their own agenda, rather than working to fulfill the goals of the collective group” (Boeker et al., 1994). Boeker et al. (1994) further found, in studying hospital boards that size and diversity had a negative relationship with strategic change. Meyer (1982) supported these findings and added that when environmental change is extremely turbulent, radical, and complex, the ability of a large board to successfully incorporate strategic planning is often drastically limited.

As is the case with school district amalgamations, there does not appear to be a one best governance model for hospital boards. Alexander (1990) explained that, “Rather, each hospital must consider its particular situation in terms of its mission,

stage of development, fiscal position, and environment before deciding what, if any, modifications to its governing board are required and feasible” (p. 28).

School District Size

Frequently the field of education attempts to import business and profit making strategies into its child centered discipline. The issue surrounding organizational size, with its “bigger is better” formula has become one of the latest matters of contention. It is often very difficult to transpose our thinking about business organizations into the educational domain. We often assume that what is good for one, should be good for both. In the business world, economists have found that there is an economy of scale that can be applied to the manufacturing of goods. As production numbers rise, unit costs should correspondingly go down. This is only partially true because at a certain point it often becomes more and more costly to produce the same item. Gold (1981) concluded that, “It is important to recognize that the widespread faith in the ‘economies of scale’ has not gained much support from the relevant theoretical and empirical literature” (p. 5). Others have found that “results of scale-economy studies have been mixed with some researchers reporting a negative relation between size and economies of scale, others finding a positive relationship, and a third group identifying medium size as most economical” (Gooding & Wagner, 1985, p. 462).

Applying economies of scale to school districts is difficult because of the number and variety of factors that influence the cost of learning (Fox, 1981). Ramirez (1992) insists that a school is not a building, but rather a learning community. Therefore, further difficulties arise when trying to decide ideal size in terms of quality of program, geography, number of students, or economy in costs. School district optimum size should be perceived as “an elastic concept related to the mix of organizational mission, institutional setting, and available resources. At the extremes of

the elasticity of effective size are the inefficiencies associated with economy of scale and bureaucratic gridlock” (Ramirez, 1992, p. 90).

Nachtigal (1992) supported this position suggesting that by seeking economies of scale through consolidation is, “at best, elusive” (p. 55). Consolidation of schools and districts contribute “to the demise of rural communities, the dollars saved are a high price to pay for the loss of those communities” (p. 55).

Walberg’s (1992) analysis of school district size in relation to academic achievement found that states with the smallest average district size (250 students, North Dakota, Montana, Nebraska) had the highest levels of achievement. Conversely those states with the largest average district size (200,000 students, Louisiana, Florida, Hawaii) had the lowest level of academic achievement. Gooding and Wagner (1985) in their review of organizational size relevant to school districts, hospitals, colleges, and schools, concluded that the value output was inversely related to size. Larger organizations were found to be less efficient at producing quality outcomes. Monk (1987) and Walberg and Fowler (1987) supported this position. Their studies in New York State, New Jersey, and Colorado confirmed that larger school districts achieved significantly lower academically than smaller school districts. Also in support, a New Jersey study by Walberg and Fowler (1987) concluded that large school-district size was detrimental to student outcomes and that district size had an independent effect upon those outcomes.

Yet with all this evidence supporting smaller school districts, historical trends in the United States show that from 1940 to 1990, “the number of school districts declined 87 percent, from 117,108 to 15,367. The average number of students enrolled in each district rose more than ten times, from 217 to 2,637 students” (Walberg 1992, p. 119).

The *Educational Research Service* (ERS) (1974) in its analysis of some 30 studies on school district size dating from the 1930’s to the 1970’s found that the

average optimum size of school districts, based on a per student count, was 10,000 to 30,000. Bilow (1986) in his review of 1970 school district sizes in Oregon, British Columbia, and Manitoba found that optimum size was measured in reference to student numbers and cost per student, not quality. His findings showed that optimal size was based on population density. The higher the population density the larger the optimum school district size. Bilow further indicated that:

In Oregon, the optimal district size was about 51,000 students. In British Columbia, the optimal size was 15 - 20,000 students, much less than half of what it is in Oregon. The population density in Oregon is about twice that of British Columbia. In Manitoba, the optimal size was about 4,000 students, or less than one-tenth of what it is in Oregon. The population density in Manitoba is about one-fourth that of Oregon. (p. 25)

Wells (1993) in his review of school district reorganization in Ontario found that there is no evidence that any money was saved because of amalgamation. In fact, the move to merge more than 1,000 small school jurisdictions into 175 administrative units in the 1960s may have actually cost the province of Ontario money. Further comments by Wells (1993) on more recent plans to amalgamate Windsor and neighbouring Essex County boards indicated that any ". . . benefits of cost-reductions would go to the provincial government - not local taxpayers - in the form of reduced grants to the boards" (p. 8).

"Although size of a jurisdiction is a relevant consideration, it is the fit that matters, not the size *per se*" (Oakerson, 1992, p. 91). This fit is a product of "the relatively small size of the local public economy in rural areas, not the small size of jurisdictions, that may limit the ability of rural communities to achieve the most efficient scale of service or service-component production" (p. 92). Oakerson (1992) also reported that:

The size of the local public economy increases the potential complexity of its service production structure and thus increases the possibilities for locating or creating service producers who can operate at diverse scales. A smaller public economy in a given locality yields less complexity and a diminished ability to operate at diverse scales of production. In these circumstances, consolidation of jurisdictions offers no solution to the service production problems of many rural areas. (p. 92)

This lead Oakerson (1992) to the conclusion that:

Large rural jurisdictions may be less able to sustain the relationships of trust and reciprocity among community members that create valuable social capital, which is often a key factor in the production of services by agencies of education, social assistance, and social control. (p. 92)

The effect of size must be addressed as a function of situation and condition. Ramirez (1992) reported a similar position:

Considering the size question in isolation is futile. The focus must be on determining the critical path to the best fit between organizational mission and size. Questions of balance are more important than size. Issues about services, programs, and resources, for the target population are significant; institutional size is secondary. Trade-offs and compromises around size issues are inevitable and part of the process of configuring resources to meet desired outcomes. For these reasons it is important for researchers and policy makers to consult with those affected by decisions about size in order to gain the historical, cultural, and political perspective on the size question for a particular community" (p. 90). "Local communities should face realistic cost calculations in making size-related decisions . . ." with an understanding that ". . . low population density decreases demand for some local services as it increases the costs of producing certain services." (p. 92)

Fowler and Walberg (1991) stated that, "When governing units combine schools or school districts, they do so voluntarily because of the presumed benefits, either in program, curriculum, cost, or tax base, or they do so reluctantly, under compulsion, as a result of legislative or judicial intervention" (p. 199). They went on to state that, "advocates of large districts and schools argue that cost savings and diversified curricula can be effected by large organizational units" (p. 199).

Conventional wisdom would suggest that savings could also be procured through the reduction of administrative and support staff and the centralization of purchasing.

Chambers (1981) reported that larger districts actually increased administration and support staff to handle the increased bureaucratic demands. In rural areas the greater cost associated with transportation and distribution of resources and materials tended to offset any savings realized through amalgamation. Guthrie (1980) agreed stating that:

Evidence in favor of cost savings associated with larger size schools and school districts is, at best, ambiguous. In the instance of rural schools, the setting where consolidation has been most dramatic, it is exceedingly unclear that

efficiency favors larger organizations. Transportation appears to make the difference. (p. 64)

Monk (1992) commented that although the merging of districts reduces the number of superintendents and is perceived as a cost saving measure:

... the reality may be quite different. If the merged district responds by hiring an assistant or deputy superintendent to help the superintendent fulfill his or her duties, the savings to taxpayers can be substantially eroded. In fact, it would be possible to face higher administrative costs following the reorganization, particularly if community turmoil is a by-product. (p. 41)

A second important factor addressed by Monk was, “central administrative costs are a relatively small portion of school districts’ budgets. The real savings associated with reorganization and consolidation strategies arise to the extent that average class sizes rise with no loss in student performance (and no increases in teacher compensation)” (p. 41). Finally, decision makers need to be cognizant of the features that make each school district unique. Monk concluded by stating that, “case studies on this topic suggest that each reorganization is highly individualistic. This reduces the role of “expert knowledge.” Reorganization advocates must confront the reality that each reorganization is unique and that experiences gained elsewhere will be relatively inapplicable” (p. 42).

Personnel

“Organizations and people depend on one another. People look to organizations to satisfy a variety of economic, personal, and social needs, and organizations in turn cannot function effectively without the energy and talent of their employees” (Bolman & Deal, 1991, p. 130). Identifying the feelings and perceptions of personnel during mergers should be an important issue as only one out of five organizational transformations are successful (Swaim, 1985). In an examination of corporate mergers, Hunsaker and Coombs (1988) indicated that “people needs” are not usually considered a priority during the merger process. They further explained that mergers are typically stressful and therefore should require better planning, communication and

additional support than they are currently being given. During organizational transformations, managers appear to experience a profound sense of insecurity, uncertainty, threat, and loss of control (Blake & Mouton, 1983; Mirvis, 1985). This substantiates Hunsaker and Coombs (1988) position that during the merger process, “‘people’ issues are often mishandled as the acquirer improvises instead of following a strategically designed, systematically conducted program for corporate integration” (p. 57).

Burlew, Pederson, and Bradley (1994) in their study of managers during the planning phase of a corporate merger, supported the position that people needs must be addressed before, during, and after an amalgamation. They found that managers felt uninformed, stressed, confused, insecure about their positions, and disappointed that they were considered unimportant. Recommendations were established that promoted the use of employee assistance programs to assist and counsel managers going through the amalgamation process.

Teaching has always been regarded as an extremely stressful occupation (Cox & Brockley, 1984; Dunham, 1992; Mills, 1990; ATA, 1993). In their study of 76 teachers from five Northern Ireland Secondary Schools, McHugh and Kyle (1993) compared the stress levels of teachers relevant to school mergers. Of the five schools in the study, two had merged, two had not merged, and one was under the threat of amalgamation. Their study indicated that teacher stress was considerably higher in the school that was under the threat of merger. The next highest level of stress was found in the teachers of the merged school, and significantly lower stress levels were found in the not merged schools. The researchers commented that the recorded stress levels were significantly high enough, to prompt immediate concern and action relating to the teachers well being and ability to do their jobs. McHugh et al. (1993) concluded that, “the amalgamation of schools constitutes traumatic organization change which carries

with its threats of redundancy and skill obsolescence, changes in authority and responsibility, a new organization culture and general upheaval” (p. 24).

Kyriacou and Harriman (1993) concurred with the findings of McHugh et al.. In their study of an amalgamated North England Secondary School, the stress perceptions of 10 teachers was examined. Their findings stated that:

School merger is a particularly stressful process for those concerned. Perhaps the most acute stress reported here simply concerned the uncertainty and lack of information provided, coupled with the very real consequences for those involved (such as the threat of losing their job and the likelihood of major changes in their working practice). (p. 301)

Review

Whether it is considered restructuring (Markides, 1995; Evans, 1999), merger (Brueder, 1989; Napier, 1989), amalgamation (Nance & Fawns, 1991), rightsizing (Hitt, Keats, Harbak, & Nixon, 1994), or downsizing (White, 1992), changes to the organizational face of education in Alberta has occurred.

Giles and Proudfoot (1990) and Carney and Peters (1995) both indicated that changes to the size and number of school districts in Alberta has been occurring for decades. As towns grew and better roads were built, the consolidation and centralization of educational services became a reality. In 1993 there were 141 school jurisdictions in the province, and by 1995 that number had been reduced to 63 (Evans, 1999). The 1994 consolidation of school jurisdictions in Alberta created school districts that had an average population of just over 8,000 students in 1995, up from an average of almost 3,900 students in 1993 (Guide to Regionalization, 1994).

The trend to reduce the number of school jurisdictions was simultaneously occurring across Canada. In the 30 year period from 1965 to 1995, the number of school districts in Canada fell from roughly 6,500 to less than 800. At the same time, the number of students enrolled in each jurisdiction rose from an average of just over 700 to almost 6,500 (Economic Service Bulletin, 1994). By 1997, Peters (1997)

estimated that there would be approximately 350 school districts across Canada with an average student population of about 16,000. This reduction in the number of school jurisdictions across Canada occurred in a variety of ways.

Newfoundland required the Canadian Parliament to amend Term 17 of the Terms of Union that Newfoundland had with Canada (Peters, 1997). This amendment allowed the provincial government authority to eliminate the church run schools and replace them with 10 interdenominational publicly elected school boards (Ontario Ministry of Education and Training, 1997). Prince Edward Island, New Brunswick, and Nova Scotia all reduced the number of jurisdictions in their respective provinces through provincial legislation. These provinces established jurisdictions along anglophone and francophone lines (Economic Service Bulletin, 1994). Like Newfoundland, Quebec needed outside intervention before it could proceed with changes to its educational structure. A 1993 Supreme Court ruling provided the province with constitutional ruling that entitled them to create new linguistically oriented school boards (Globe & Mail, June, 1998). The governments of Ontario, Manitoba, Saskatchewan, and British Columbia all conducted commissions and reviews of their existing systems. Though sometimes unclear and not necessarily in favor of amalgamation, each of these provinces decided to reduce their number of school jurisdictions (Economic Service Bulletin, 1994).

Studies conducted over the past couple of decades on school system, college, and corporate amalgamations provided a variety of views related to the need, process and effectiveness of mergers. In reviewing the amalgamations of a number of school jurisdictions, Guthrie (1980) and Davis (1986), found that some savings and benefits may result from amalgamating, but these could only be evaluated on an individual case basis. The OSBRTF (1996) agreed, stating that there is considerable savings and benefit to be had through the amalgamation process.

Contrary to the above findings, the OPSBA (1995) and Erikson (1994), found that there was no benefit to school system amalgamation. Any cost savings that might occur would be negligible.

Hall (1994), Sharpe (1989), Shepherd (1988), and Gavin (1986) discovered widespread dissatisfaction among employees and community members of amalgamating districts. This dissatisfaction was based on the lack of participation in the process and the perceived loss of small community identity.

In a study of hospital mergers, Alexander (1990) reported that success and effectiveness of amalgamations could only be determined on an individual case basis.

The study of college mergers showed a much more positive result. Gamage (1992), Brueder (1989), Barr (1985), Chambers (1983), and Denmark (1983) all reported significant positive economic and program outcomes because of college consolidation. Though not without problems, the mergers reviewed proved to be successful because of the efforts taken to establish a vision and master plan, communicate the plan of action and involve all stakeholders in the process.

Like colleges, the growing number of corporate mergers are facing diverse challenges. Markides (1993) and Khemani (1991) both claimed that the number of corporate mergers in the past decade had risen by over 50%.

Jensen (1988), Lubatkin (1987), and Barton (1988) reported increased profit margins and market values of corporations that had amalgamated. Franko (1989), Hopkins (1987), and Porter (1987) found the opposite to be true. Their findings showed that companies that had recently merged were unable to sustain growth and short term profitability. They indicated that these corporations had spent too much time, effort, and money on the merger process rather than on maintaining a quality product or service.

Lei and Hitt (1995) reported mixed results. Those corporations that established a plan for restructuring were usually successful. They also found that after a major

reorganization, managers were less likely to take risks or venture into new initiatives. As a result, less time and dollars were spent on professional development of personnel, less effort was put into product research, and technological advancements were put on hold. These short term decisions created long term problems. In support of Lei and Hitt, Tomasko (1990) stated that restructuring should not occur unless it is well planned and involves the entire workforce of the corporations involved.

One result of restructuring is the change to board size. The research showed that there was conflicting points of view regarding the size of corporate boards. Pearce and Zahra (1992) and Boeker, Gautam, and Goodstein (1994) maintained that larger boards provide better leadership in that they are able to provide a more diverse representation of the organization.

Alexander (1990), Judge and Zeithaml (1992), and O'Reilly, Caldwell, and Barnett (1989) disagreed. Their findings indicated that smaller boards were able to operate, adjust, and make decisions more quickly. Smaller groups are more efficient and responsive to the needs of the entire organization than larger boards which may consist of a number of special interest groups.

The issue of organizational size is largely related to economies of scale (Gooding & Wagner, 1985). Ramirez (1992), Nachtigal (1992), and Oakerson (1992), agreed. They indicated that size is an elastic concept and organizations should be more concerned with meeting the needs of their clients/students than worrying about size. Walberg (1992) and Monk (1987) found that relative to student academic outcomes, small school districts did better than larger jurisdictions. In addition to academic gains, Wells (1993) and Monk (1992) indicated that a perception exists when organizations merge that cost savings will result. They found the opposite to be true. Not only were the savings negligible, the cost of amalgamating overshadowed any real savings.

Organizations are comprised of people and organizational success is dependent on people achieving defined goals. During the merger process, Swaim (1985) and Hunsaker and Coombs (1988), found that employees seldom played active roles in the restructuring process. This lack of involvement, communication, and direction created a sense of insecurity and stress. Burlew, Pederson, and Bradley (1994) reported the same perceptions existed with managers involved in restructuring. In school settings, Kyriacou and Harriman (1993), McHugh and Kyle (1993), and the ATA (1993) all reported that external directives aimed at restructuring schools and school organizations was extremely stressful for teachers. The general position held, was that school jurisdiction amalgamations can be successful if properly planned with active involvement from all stakeholders.

This review of the related literature attempted to identify the general theoretical and historical contexts related to this study. The following chapter describes the research design and methodology applied to this investigation.

CHAPTER 3

Methodology

The eagle in its flight does not leave a mark; the scientist does. Inquiring into this question of freedom there must be, not only the scientific observation, but also the flight of the eagle that does not leave a mark. . . . For the description is never the actuality that is described; the explanation is obviously never the thing that is explained; the word is never the thing. (Krishnamurti, 1971, p. 11)

Introduction

The primary purpose of this research was to examine the impact of restructuring on the operations of a school jurisdiction in Alberta. The research was an interpretive case study, examining the perceived impact that amalgamation has had on a particular school system. Transferability relative to the issue of restructuring rests with the reader. The research was a qualitative study in line with the definitions of Denzin and Lincoln (1994) in that it was, ". . . multimethod in focus, involving an interpretive, naturalistic approach to its subject matter" (p. 2), and of Nelson and Associates (1992) who describe qualitative research as:

. . . crosscut[ing] the humanities and the social and physical sciences. Qualitative research is many things at the same time. It is multiparadigmatic in focus. Its practitioners are sensitive to the value of the multimethod approach. They are committed to the naturalistic perspective, and to the interpretive understanding of human experience. At the same time, the field is inherently political and shaped by multiple ethical and political positions. Qualitative research embraces two tensions at the same time. On the one hand, it is drawn to a broad, interpretive, postmodern, feminist, and critical sensibility. On the other hand, it is drawn to more narrowly defined positivist, postpositivist, humanistic, and naturalistic conceptions of human experience and its analysis. (p. 4)

In the naturalistic paradigm, qualitative research does not have a distinct set of methodological processes that it can call its own. Researchers using the qualitative methodology must view themselves as the primary data collection instruments using data collection processes like observation, interviews, personal experience, and life stories. Qualitative researchers rely heavily on the interpretations as well as on participant feelings relevant to the subjects studied and data collected. They study the

objects of their research in their natural settings and interpret results in the form of verbal descriptions provided by the people involved in the study. Qualitative research, as viewed by Denzin and Lincoln (1994), stressed “process and meanings” (p. 4) which in this study related to the collection of data through interviews and records, and the interpretation of these data when analyzing the responses. They further pointed out that, “Qualitative researchers stress the socially constructed nature of reality, the intimate relationship between the researcher and what is studied, and the situational constraints that shape inquiry” (p. 4). Furthermore, qualitative researchers emphasize “the value - laden nature of inquiry. They seek answers to questions that stress how social experience is created and given meaning” (p. 4). Merriam (1988) perceived qualitative inquiry as, “inductive - focusing on process, understanding, and interpretation - rather than deductive and experimental” (p. 21). Qualitative researchers often interact closely with the subjects in their study. The data that arise from this close interaction usually come in the form of what those being studied have revealed to the researcher. Sometimes participants assist in the development of the study and the interpretation of the results. Torbert (1981) referred to this process as, “collaborative inquiry” (pp. 141-151).

Merriam (1988) maintained that qualitative researchers are interested in meaning. The researcher in qualitative research is the primary instrument for data collection. Ultimately, the underlying objective of qualitative inquiry is “to understand the meaning of an experience” (Merriam, 1988, p. 16). In this study, the meaning of the experience of those involved in the regionalization process provided the data for interpretation.

This meaning of experience for the researcher was acquired by adopting a holistic approach and is described by Patton (1985) as:

. . . an effort to understand situations in their uniqueness as part of a particular context and the interactions there. This understanding is an end in itself, so that it is not attempting to predict what may happen in the future necessarily, but to understand the nature of that setting -- what it

means for participants to be in that setting, what their lives are like, what's going on for them, what their meanings are, what the world looks like in that particular setting -- and in the analysis to be able to communicate that faithfully to others who are interested in that setting. . . . The analysis strives for depth of understanding. (p. 1)

Sherman and Webb's (1988) statement attempts to encapsulate and summarize a reality and provide an epithet for the qualitative paradigm by stating that, ". . . qualitative implies a direct concern with experience as it is 'lived' or 'felt' or 'undergone' Qualitative research, then, has the aim of understanding experience as nearly as possible as its participants feel it or live it" (p. 7).

In this study, the qualitative aspect was reflected in the following ways:

1. A case study was undertaken, interpreted and presented using verbal descriptions and not statistics for data reduction.
2. Data collection took place through the use of interviews, and reflected the participants' real life experiences.
3. The aim of the final report of the study was to present an interpretation of a real life experience and provide a guide for those who may have to experience a similar consolidation process under similar circumstances.

Like most endeavors, research is based on some underlying philosophical assumptions. This understanding establishes a rationale for the type of research and data collection process. The approach taken can either be scientifically objective and void of value interpretations, or scientifically conducted with an understanding that values and beliefs play a role in real life experiences.

Case Study Design

The case study method of exploration, in its simplest form, involves a story, a storyteller, and an audience. The story reflects a microcosm or small piece of the larger environment. In a research context, a case study involves a researcher who interprets a single subject or phenomenon and communicates the findings for others to be able to

understand and experience. This case study represents a snapshot of a moment in time that is carefully framed in a descriptive motif and will serve as a reminder of the story and its impact.

Merriam (1988) defined case study as “an examination of a specific phenomenon such as a program, an event, a person, a process, an institution, or a social group” (p. 10). Yin (1984) viewed the case study as a research design constructed for conditions that cannot separate the phenomenon’s variables from their context. Wilson (1979) described the case study as a process “which tries to describe and analyze some entity in qualitative, complex and comprehensive terms not infrequently as it unfolds over a period of time” (p. 448). MacDonald and Walker’s (1977) interpretation revealed the case study as “the examination of an instance in action” (p. 181).

Smith (1978) characterized case study as research that occurs within a “bounded system.” Case studies can occur in a number of settings, under any number of conditions. Although appearing limitless, boundaries need to be established to provide a focus on the specific phenomenon. “The most straightforward examples of ‘bounded systems’ are those in which the boundaries have a common sense obviousness, e.g. an individual teacher, a single school, or perhaps an innovatory programme” (Adelman, Jenkins, & Kemmis, 1983, p. 3). Condensed, this investigation was a case study, imposed by boundaries of time, setting, and subjects, further investigating the meaning of the experience that occurred within those boundaries.

Further analysis and comprehension was gained in this study through an understanding of the characteristics associated with case study. Merriam (1988) discussed four characteristics that portray good case study research. These essential elements relate to the qualitative case study are: particularistic, descriptive, heuristic, and inductive.

A case study is particularistic in that it focuses its investigation on one particular situation, event, or phenomenon. This particular case study with its established boundaries, and the resulting data that arose from the examination, contributed important information for the descriptive analysis of the phenomena.

Being descriptive means that the findings of the investigation are written in a format that provides the reader with a rich and thick account of the events or phenomenon. Validity is grounded in the accumulation of rich and thick data.

Heuristic implies that the case study will reveal information relevant to the study and stimulate the reader to think beyond the particular bit of information. The case study description should augment the reader's previous understanding of the phenomenon being studied and should challenge the reader to explore more into the topic.

According to Merriam (1988) being inductive is the fourth characteristic of case study research. Case study analysis relies heavily on inductive reasoning. Interpretations, theories or hypotheses that arise from the data are grounded in the data themselves. The discovery of new relationships or concepts is of primary importance for the advancement of knowledge and understanding relating to the phenomenon.

Although the processes and components of data collection and analysis in case study research are as varied as the researchers and their philosophical methodological constructs, a number of generalities can be assumed.

Bogdan and Biklen (1982, pp. 147-154) provided nine suggestions for data analysis:

1. From the onset, establish a narrow focus for the study. Choose one phenomenon to observe and investigate.
2. Decide what type of study you want to conduct.
3. Develop analytical type questions for use in the study.
4. Use previous data collected as a guide for further inquiry.
5. Become a critical thinker by recording researcher comments, thoughts and hypotheses as the research progresses.
6. Establish a system of notes, reminders and memos to yourself about issues and theories you may want to pursue later.

7. Use your subjects as sounding boards. Discuss your interpretations, ideas and theories with them.
8. Conduct a literature review while you are in the field. This will enhance your inquiry and analytical skills.
9. Begin to develop and play with metaphors, analogies, and concepts.

Data collection can be an exhausting process that could go on indefinitely.

Determining when to cease data collection is an important consideration. Lincoln and Guba (1985) described four guidelines for this decision; ". . . the exhaustion of resources, . . . the saturation of categories, . . . an emergence of regularities, . . . and an overextension . . .," a perception that new information is not related to the focal point of the study (p. 350).

Once data have been collected they need to be filed and categorized in a manner that will allow for easy retrieval and classification. Classification can be done in a variety of functional formats. Chronological, topical, thematic and theoretical categories can be developed. Reviewing the original proposal, questions and hypotheses, is recommended as a refocussing step by Goetz and LeCompte (1984). Categorization and classification associated with this study was established both chronologically and thematically. Regularly revisiting the proposal and its intent kept the researcher focused on the purpose.

The second step involved data analysis or the making sense of the findings. As connectivity and linkages were developed and refined, categories and concepts were identified that began to provide relevance and meaning to the data. Initial data analysis was conducted through the reading and highlighting of the transcripts. Notes were taken and charts were created that cross-referenced themes, participants and job roles.

The third pass over the data provided the researcher with an explanation of the interrelationships of categories. This analysis should and did stimulate insight into the development of alternate paradigms, new metaphorical images, philosophical generalizability, and theoretical applicability.

Lincoln and Guba (1990) also cited four significant criteria to which case study composition should adhere. They labeled these “resonance, rhetoric, empowerment, and applicability” (Lincoln & Guba, 1990, p. 54). Resonance implies that there is a workable match, or degree of fit between the written case study, final product, and the basic methodology used by the researcher to conduct the study. In this study, the qualitative case study provided the data for the resulting interpretation.

The rhetoric criterion refers to the overall structure, form, and organization of the case study. Elements of form include coherence, unity, organization, clarity, simplicity, use of natural language, maximizing reader interest and writing craftsmanship. The final narrative should provide readers with a sense of experiencing an exciting and enlightening reality related to the reorganization of this particular school jurisdiction.

The empowerment criterion implies a state of consciousness raising. The case study should evoke a sense of understanding by the reader and might even promote additional questions and research related to the study.

An increase in knowledge, a sense of understanding, and appropriateness would result in the reader being able to infer judgment of applicability. A rich amount of description will allow for reader learning to take place. The case study should present a narrative that invokes a feeling of applicability and transferability. The results of this study provide the reader with an opportunity to compare events, results and implications of school jurisdiction merger.

In review, a case study can be described as, “an intensive, holistic description and analysis of a single entity, phenomenon, or social unit [as examined in a bounded system]” (Merriam, 1988, p. 16), that is written in a stimulating, expressive manner with the intent of challenging the reader to reflect and take action.

This case study was bounded by the parameters of one school jurisdiction that was previously made up of three jurisdictions, and by the participants who were

involved in the process of regionalization. Data were collected by means of interviews and document analysis. The written case is a rich account about the impact, as presented by the respondents. The final thesis provides an in-depth view of the regionalization/amalgamation process in this jurisdiction and provides readers with the opportunity to understand the process and its impact on people and the organization.

To ensure that an appropriate research project was conducted, issues related to reliability, validity, and ethics were addressed.

Participants

The four administrative officers in this newly formed school jurisdiction (superintendent, deputy superintendent, associate superintendent, and secretary treasurer) were interviewed. Interviews were also held with a previous superintendent, three principals and three teachers. Each of the principals and teachers was purposefully selected, one from each of the pre-amalgamated jurisdictions. Gall, Borg and Gall (1996) suggested that, "purposeful sampling is not designed to achieve population validity. The intent is to achieve an in-depth understanding of selected individuals, not to select a sample that will represent accurately a defined population" (p. 218). The superintendent, deputy superintendent and associate superintendent were asked to provide the names of three principals and three teachers from each of the previous school districts. These administrators were asked to nominate perceptive individuals whom they believed had some understanding of the regionalization process and had been with the previous school system for a minimum of five years. The five year minimum provided greater assurance that participants had a reasonable understanding of their particular jurisdiction, its policies, programs, finances, and organization structure. The researcher then selected three principals and three teachers from the list, based on the number of times they were selected by the administrative

officers. Table 3.1 classifies the 14 participants who took part in the study according to district and position.

Permission to conduct the study, and to interview jurisdiction personnel was obtained from the superintendent, and each individual respondent. No additional respondents were interviewed.

Table 3.1 Participants in the Study

	Jurisdictions			Total
	Bowlen	Pearl City	County of Elcot	
Central Office Administrators	1	1	3	5
Principals	1	1	1	3
Teachers	1	1	1	3
Trustees	1	1	1	3
Total	4	4	6	14

(Note: Central Office Administrators include: superintendents, deputy superintendents, associate superintendents, and secretary treasurers.)

Pilot Interview

A pilot interview was conducted with a superintendent of schools from a consolidated school jurisdiction that had no connection with the jurisdiction under study. This dialogue assisted the researcher in refining questions for the interview, establishing reasonable time parameters for interviews, and providing the researcher with feedback as to the relevance of the themes and issues identified.

Interviews

Interviews with all participants were conducted in an informal setting and informal manner. Participants had been contacted in-person before the interview to inform them of the study, obtain their consent, and determine an appropriate time and location for the interview. Interviews were all audiotape-recorded. During and after the interview, written entries were made in a journal. Journal entries included items that were not or could not be recorded on tape. Some of these included confidential comments and observations that participants did not wish to be recorded, body language of participants, and eagerness of participants to expand and discuss issues. Journal entries also assisted in the development of additional themes and ideas that emerged from the interviews. The journal was also used for recording reflective thoughts, immediate interview interpretation, and questions that might require further research. This allowed the researcher to write down ideas and reflections related to the interviews. Concepts and questions that required additional inquiry were also recorded in the journal. The journal also served as chronological record of the researchers activities. The research journal, interview tapes, transcripts, and analysis notes were maintained and kept in the event that at the conclusion of the research someone may desire to follow an audit trail.

Interviews were conducted at the participants' place of work unless they requested otherwise. The length of the interviews varied, but on average were about an hour and a half long. Recorded interviews were transcribed and edited for readability. Additional time was taken to clarify responses, review data and obtain some additional information that had been omitted previously. Participants received entire transcripts to review and edit for clarity and readability.

Data Analysis

Gall, Borg and Gall (1996) suggest that data analysis is a systematic process of organizing and arranging the information in the interview transcripts to better understand the data, and then inform others of the findings. The analysis involves working with the data collected, organizing, searching for patterns, discovering what is relevant, and deciding what to tell others (Bogdan & Biklen, 1982).

Data collection and analysis in this study began with the review of the documentation collected from the Alberta Department of Education and the school jurisdiction. This was done prior to the interviews to enable the development of appropriate interview questions and establish an understanding of the process that had taken place in relation to the restructuring. After conducting the interviews the transcripts were read and reread. During subsequent rereads, the transcripts were highlighted, and the highlighted statements categorized under specific themes and issues that related to the questions being researched. Participants were contacted if interview data or researcher interpretation required clarification.

Issues of Rigor

One of the goals of research is to generate new theory and knowledge in a valid and reliable fashion. Empirical rigor can be defined as an attempt at achieving validity and reliability. Guba and Lincoln (1981) used the term “trustworthiness” as an umbrella word that encapsulates the spirit of rigor as it relates to credibility, dependability, and potential transferability of research findings. Those conducting qualitative case study research, need to be especially concerned with issues of reliability and validity. Lather (1986) suggested that “our best tactic at present is to construct research designs that demand a vigorous self-reflexivity” (p. 270). Because of direct researcher involvement, and the absence of a scientific formula for conducting the research, investigative neutrality must be ensured when checking the credibility and

comprehensiveness of the data and minimizing the distorting effect of researcher bias. Neutrality was achieved by conducting member checks and peer examinations of the analysis.

Validity deals with the researcher's interpretation of the data. The interpretation should be based on sound and well grounded principles and evidence. Do the researcher's observations and findings match reality? Does the investigative process address what it was intended to address? Walker (1980), Ratcliffe (1983), and Lincoln and Guba (1985) viewed validity as an interpretation of a researcher's perceived reality rather than reality itself. Merriam (1988, pp. 169-170) outlined the following six basic strategies for ensuring validity: triangulation, member checks, long-term observation, peer examination, participatory modes of research, and eliminating researcher bias.

This study incorporated three of Merriam's approaches for ensuring validity: (1) member checks were incorporated by contacting all participants to review transcripts and interpretations; (2) peer examination was utilized by having fellow doctoral students read and review transcripts and their corresponding interpretations; (3) multiple data sources were used in the study to ensure trustworthiness.

Reliability deals with the issue of consistency over time. If replicated, will the study reveal the same results and findings? Merriam (1988) pointed out that "reliability in a research design is based on the assumption that there is a single reality which if studied repeatedly will give the same results" (p. 170). The aim of qualitative research is to describe and explain the world as seen by those participating in it. For Bednarz (1985):

If the researcher's self is the prime instrument of inquiry, and the self-in-the-world is the best source of knowledge about the social world, and social reality is held to be an emergent property of interacting selves, and the meanings people live by are malleable as a basic feature of social life, then concern over reliability - in the postpositivistic sense - is fanciful. (p. 303)

Because of the nature of this particular case study, involving a particular phenomenon that occurred during a specific time, under distinct conditions, the

researcher was not particularly concerned about the generalizability or replication of the study.

Generalizability, sometimes labeled as external validity, refers to the extent to which the results of one study can be applied to other situations. In case study research, the difficulty lies in making generalizations from a single case. But one must remember that the case study method was chosen to gain an in-depth understanding of a particular situation or phenomenon. Generalizability of the study findings to other situations, in the sense in which this word is usually meant, was not the main intent of this study.

Patton (1980) contended that qualitative research should “provide perspective rather than truth, empirical assessment of local decision makers’ theories of action rather than generation and verification of universal theories, and context-bound information rather than generalizations” (p. 283). Although every effort was made to provide a rich, thick description of the restructured jurisdiction, transferability by the reader is presumably limited to similar jurisdictions that have undergone corresponding regionalizations or amalgamations. The onus of transferability relies on the reader, who must determine the relevance and appropriateness of the findings within specific contexts and experiences.

The multiple data sources and the feedback accomplished what Babbie (1986) identified as a need for several “yardsticks” (p. 114) when discussing validity.

Ethics

Ethics deals with the standard of conduct and moral judgment of the individual researcher. Researchers must understand the implications of their study and the potential impact it could have on those involved in the study.

Issues related to purpose, funding, involvement, confidentiality, anonymity, methodology, risk, opting out, and consent were discussed with each of the

participants at a pre-interview meeting and subsequently in writing. All aspects of the research were presented before an ethics committee and approved before any research was conducted.

All participants were assured that their contributions were confidential, and that they had the right to opt out of the research at any time.

Limitations of the Study

Limitations, as defined by Rudestam and Newton, (1992) are those “restrictions in the study over which you have no control” (p. 74). Two limitations were identified in this study. The first of these was the number of participants in the study. The 14 identified respondents were not representative of the total population of those on whom the restructuring had an impact.

A second limitation related to the validity of the findings over time. As policy, funding, and political-will change, the impact of the restructuring may change.

Delimitations of the Study

Rudestam and Newton (1992) defined delimitations as limitations “on the research design that you have deliberately imposed” (p. 73). This study was confined to one newly merged school jurisdiction in Alberta. The study focused on the impact of consolidation on this particular school jurisdiction. Because the study was restricted to one jurisdiction, there was no attempt to generalize beyond the jurisdiction in question.

A further delimitation imposed upon the study was the variable of time. Data were collected during the two months of May and June 1997. At this time the regionalization process was nearly complete, and participants would have had the opportunity to experience the impact.

A third delimitation imposed by the researcher was that some participants interviewed, namely principals and teachers, had to have been employed by their

respective boards for at least five years. The five year minimum employment record provided greater assurance that participants had a reasonable understanding of the district, its policies, programs, finances, and organization structure.

Review

From the beginning, the intent of this chapter was to “lasso” a theoretical, practical, and functional understanding of the philosophical and methodological paradigms that, when tied together, provide the approach which guided this research project. Having conducted the research in the manner described, the researcher contends that this study:

1. Accurately reflects the perceptions of those on whom the restructuring process had an impact.
2. Provides insight into the positive and negative aspects of school system restructuring.
3. Provides direction for other jurisdictions to develop procedures for effective and efficient regionalization/amalgamation.
4. Identifies areas of concern that require additional research.

CHAPTER 4

The Creation of a New School Jurisdiction

Many have dreamed up republics and principalities which have never in truth been known to exist; the gulf between how one should live and how one does live is so wide that a man who neglects what is actually done for what should be done learns the way to self-destruction rather than self-preservation. The fact is that a man who wants to act virtuously in every way necessarily comes to grief among many who are not virtuous. Therefore if a prince wants to maintain his rule he must learn how not to be virtuous, and to make use of this or that according to need. (Machiavelli, 1961, p. 163)

Introduction

The need to improve organizational structure in the field of education has long been a “virtuous” mission of governments. Weighing the needs of children against the demands of business, taxpayers and constituents is an important political responsibility.

Organizational restructuring is often an imposed activity. Bolman and Deal (1986) stated that:

It occurs when a particular individual or group is able to impose its agenda on the organization. Those who create change may clothe their efforts in a variety of ethical or technical disguises, but that is window dressing. What they are really trying to do is to redesign the world to make it better express their self-interests. (p. 132)

The modernization and bureaucratization of Alberta’s schools began with the move from schooling at home to the establishment of its very first “one room school house.” The task of improving educational services for students has always had substantial implications for the structure and governance of provincial education systems. In Reddyk’s (1996) words, provincial governments have long been:

committed to restructuring so as to make the best possible use of resources, while, at the same time, recognizing pressures from issues such as global competitiveness; poverty and emotional distress; the changing demographics of our province; the demand for greater parental involvement in educational decision making; as well as the need for increased integration of services to children in the area of education, health, and social services. (p. 4)

Mazurek (1999), in reference to Alberta in the 1930s, provided an example of the point Reddyk was making. Mazurek explained, "Like every other province and nation during the Great Depression, Alberta was struggling to find a remedy for the economic and social gloom into which the industrialized world had plunged. Desperate measures were needed" (pp. 6-7). Education was the answer.

As the province continued to grow, so too did the demands placed on the educational programs and structures within it. In 1936, Alberta led a national reorganization towards the formation of larger educational administrative units, particularly for the vast areas outside the sprawling urban municipalities. Giles and Proudfoot (1990) remind us that this was the second and larger-scale effort at merging school districts in Alberta. They report that one of the expected goals was not achieved. In their words, "The reasoning paralleled that of the earlier change to consolidated school units from the individual one-room schools. There would be, the proponents of enlarged units would say, a real cost saving. This was not to occur" (p. 57).

Although the anticipated cost savings of consolidation were not fully realized, other advantages did promote the need for the amalgamation of smaller districts. Some advantages realized were: larger centralized schools were better staffed, better equipped, and could offer a wider range of academic and non-academic courses. Larger divisions could also provide for specialist teachers who could travel between schools and provide services in French, band, library services, shop and home economics, student testing, and counseling. This new, Alberta made, administrative-organizational model for the field of education was the school division. These newly created divisions could elect a board of trustees based on a ward system, with additional trustees elected from the towns and villages geographically located within the division. A central office was established that housed a full time staff, supplemented by a provincially appointed superintendent. Although the establishment of a new educational structure was seen to be a positive move, it did have a negative side. Giles and Proudfoot (1990) claimed that:

The closing of a smaller, local school was viewed as a threat to the local merchants, local school board members feared loss of authority and prestige, and students had to spend longer hours on a school bus over roads which, in many instances, had not yet been developed to satisfactory standards. (p. 58)

Between 1937 and 1959 there were 55 school divisions formed in the province.

These new school divisions nearly blanketed all of rural Alberta encompassing most small towns and villages (Giles & Proudfoot, 1990).

As school divisions and municipalities around the province grew, educational and municipal services to the public expanded. The duplication of many services such as the election of boards, tax collecting, central offices, buildings and staff, were all viewed as unnecessary and costly. It was perceived that the amalgamation of municipal districts, school divisions and hospitals would provide for an omnibus governmental and organizational structure that would provide for a more effective and efficient system. Attempts at including hospitals in the structure did not work. Subsequently, hospitals went ahead and created their own boards and jurisdictions. In an effort to consolidate school and municipal services, the Alberta Legislature passed the *County Act* in 1950 that brought rural school divisions and municipalities under one government and administrative structure. Between 1951 and 1969 thirty-one counties were formed. One of these was the county included in this study which, for the purposes of the study, has been called the County of Elcot.

Educational Beginnings of the County of Elcot, Pearl City, and Bowlen

The County of Elcot was formed in the early 1960's, providing educational and municipal services to its residents until the dissolution of its educational component on January 1, 1995. Under the county system a single group of elected councilors made decisions based on municipal and educational needs within its geographical area. The central office was located in a small town within the region and housed offices for educational as well as municipal personnel. Many services such as payroll, personnel, maintenance, and transportation were shared. Before consolidation, the County of Elcot

was the administrative authority for 14 schools that provided a variety of programs for a student population of about 4,750.

The largest town within the geographical boundary of the County of Elcot was Pearl. The town of Pearl had become Pearl City in the early 1980's and at the beginning of the new school year, all of the schools within the new city limits, formed a new and independent school district. Prior to Pearl becoming a city, schools within the town were all under the jurisdiction of the County of Elcot. By 1994 the Pearl City School District operated seven schools that educated approximately 2,650 students.

During the 1950s when many rural school divisions were being transformed into counties, a unique request was made by the town of Bowlen. Although geographically located in the County of Elcot, Bowlen made a special request, based on location, demographics, and community autonomy to the provincial government. This petition for a distinct governance model saw the creation of a new and unique educational configuration within the province of Alberta.

This unique form of governance, an urban county, was created by the legislative assembly especially for the town of Bowlen. The municipal and school administration acts allowed for the election of seven town councilors within the town of Bowlen who would have the responsibility for all municipal and educational matters. The act gave the town council of Bowlen complete control over the former Bowlen School District. The new Bowlen School District, under special legislative authority, was officially established June 29, 1950. The Bowlen School District operated out of the Bowlen town offices until its dissolution on January 1, 1995. Before the merger, Bowlen operated three schools with a total jurisdiction enrollment of approximately 1,100 students.

On January 1, 1995, Bowlen School District, Pearl City School District, and the County of Elcot School Division officially became the Ebony Pines Regional School Division. The resulting regional school division assumed responsibility for 24 schools

with a student population of about 8,500 students. The formal and legal reorganization was the culmination of many discussions, debates and negotiations.

The Road To Regionalization

Shortly after the January 1994 Ministerial announcement regarding a major restructuring of basic education in Alberta, school trustees in the Bowlen School District, Pearl City School District, and the County of Elcot began in-house discussions relevant to the possible implications of consolidation. The respective boards had numerous meetings and discussions regarding the following questions: Was amalgamation inevitable and would the Minister force jurisdictions to merge? Was it better to be proactive or reactive? With which jurisdictions should we merge? Given the government's definition was it better to regionalize or amalgamate?

Realizing that the Minister was serious in his intentions to reduce the number of school boards across the province, the three boards decided it would be far better to take a proactive approach and proceed with the regionalization of the three systems that were geographically situated within the boundaries of the County of Elcot. The jurisdictions playing an active role in this process indicated that regionalization was preferable to amalgamation because:

1. Regionalization was considered a voluntary merger of two or more school districts that chose to be united.
2. Regionalization could occur after each independent school board passed a resolution confirming its commitment to form a regional division and then enter into a regional agreement.
3. Trustees were elected to wards that were established and confirmed by the regional agreement.
4. The numbers of wards and trustees were established and ratified in the regional agreement.
5. Following regionalization the participating jurisdictions continued to exist.
6. Anytime after four years following the establishment of a regional division, the electors in any one of the wards could petition the minister for a plebiscite to request the withdrawal of that ward from the regional division. The petition would require 10% or 2,000 signatures. If the majority of the electors voted in favor of withdrawing then the participating jurisdiction would be reestablished as its own school district with its original form of governance.
7. If the majority of the electorate did not vote in favor of withdrawing then that ward could not petition for a plebiscite for another six years.

Trustees indicated that at that time, the three negotiating boards perceived amalgamation to be more restrictive than regionalization due to the fact that:

1. Amalgamation could be voluntary or imposed by the minister.
2. Following amalgamation, participating jurisdictions would cease to exist.
3. Amalgamated divisions could not revert back to their original jurisdictions.

When the three boards independently decided that regionalization was the merger process of choice, they set a meeting for March 31, 1994 to begin discussions and negotiations for establishing a regional agreement. This first meeting was open to all trustees from the three jurisdictions. Discussions primarily focused on getting to know the mission, beliefs, and policy of the other two jurisdictions. The resulting discussions gave rise to a number of questions and concerns about the process, policy and regulations associated with the possible regionalization. It was decided to set another meeting for April 26, 1994 and invite the MLA Task Force on regionalization/amalgamation to attend and clarify outstanding issues and concerns.

This second meeting of all trustees, with the MLA Task force present, proved very informative and addressed issues relating to time lines, personnel, forced mergers of boards, boundaries, trustee representation and financial support for start-up costs. The three school boards were also advised that before the next meeting they should begin discussions with other educational stakeholders in their respective jurisdictions. Public meetings and discussions should outline proposed plans and options available. Meetings were held in early May by each of the three jurisdictions with parent advisory councils, business groups, municipal councils, the local ATA, and the principals' association. These meetings provided boards with the general feelings of their constituents.

County of Elcot residents interpreted a merger with Bowlen and Pearl City as a positive step that should proceed. There were some mixed reactions from the Bowlen constituents in that some residents wanted Bowlen to merge with a different adjacent county. A review of alternative mergers with different boards was undertaken by the superintendent, and alternatives were presented to the board that, in turn, decided which

consolidation would be most beneficial to students. Merging with Elcot was considered to have greater merit. Residents of Pearl directed the board to pursue with the Minister the option of remaining an independent school jurisdiction. They had separated from the County of Elcot about a decade earlier and the memory of the politics behind the separation was still fresh for many citizens. The Minister indicated that the city school jurisdiction was not large enough to remain an independent district and would be amalgamated with another jurisdiction if the board did not pursue regionalization/amalgamation on its own.

The three boards met again on May 17, 1994 to review the answers received from the task force and to provide status reports resulting from the public meetings. Timelines and deadlines were again discussed regarding resolutions of commitment, submission of a regional agreement, and establishment of the regional division. Representation, wards, and electoral subdivisions were also deliberated on and reviewed. It was agreed at this meeting, and a resolution was passed that the Bowlen School District, the County of Elcot school system, and the Pearl City School District agree to enter into a regionalization agreement. It was further decided that subsequent meetings not be held with all trustees but with representative trustees from each of the three jurisdictions.

On May 24, 1994 all three jurisdictions held independent board meetings and passed resolutions confirming their commitment to form a regional division. The following day, representatives from each of the boards met to discuss the next step. A recommendation was made that the new jurisdiction be named Ebony Pines Regional Division. The committee also recommended that the new school board consist of seven trustees. A draft regional agreement was developed and a press release prepared for circulation in the local newspapers.

The May 25, 1994 press release read:

Pearl City School District, County of Elcot Board of Education and Bowlen School District have taken the first step toward forming a regional school division. Preliminary discussions among the districts have been occurring for some time and included a meeting with members of the MLA Task Force on Regionalization. The positive response from the task force convinced the Boards that they should proceed with the regionalization process and, as of May 24, 1994, each of the

Boards had passed motions confirming its commitment to the formation of a region. In the case of the County of Elcot Board of Education and the Bowlen School District approval was required from their respective legislative bodies. This approval has also been received. These decisions have been communicated, in writing, to the Minister of Education and he has been informed that the regional agreement will be submitted to him prior to August 31, 1994 and that the proposed establishment date for the Regional Division will be January 1, 1995.

The press release was signed by the chairs of the three school jurisdictions.

On June 15, 1994 the regionalization committee made up of representatives from each of the school boards met, and then met again on June 29 to discuss and resolve outstanding issues relating to the regional agreement. These issues centered around the transition period and team, bylaws, and the electoral boundaries for the new region. After extensive deliberations and negotiations, the agreement for the establishment of a regional division was completed, endorsed and signed by all three boards on July 12, 1994, formally abolishing the existing school systems and boards as of January 1, 1995.

The regional agreement provided the Minister of Education with a legal document naming the participants in the regionalization that would create the Ebony Pines Regional Division. The agreement indicated the region would be comprised of three wards that make up the original school jurisdictions prior to the regionalization, and establish a board comprised of seven trustees representing about 35,000 constituents. The Pearl City School District had a population of just over 11,000 and would have two trustee representatives. The town of Bowlen with a population of about 4,000 would elect one trustee, and the County of Elcot with a population of 20,000 would have four elected trustees. The agreement further divided the three wards into subdivisions according to legal land descriptions. Seven interim board members, who would act as the transition team, were identified. They would represent the newly formed regional division until December 31, 1994 at which time an interim board would be appointed by the Minister until the general elections in the fall of 1995.

Additional stipulations in the agreement provided for the transfer of all assets and liabilities to Ebony Pines. All employees were transferred to the employment of the new

division. Additional by-laws were established pertaining to the possible dissolution of the regional division.

On September 7, 1994 a Ministerial Order to establish the Ebony Pines Regional Division as of January 1, 1995 was signed.

The first official meeting of the Ebony Pines Regional Division transition team was held on September 7, 1994. The transition team set out a number of priority objectives that needed to be addressed prior to December 31, 1994. These objectives included the following:

1. To rotate the position of chair until the election of the interim board.
2. To actively and immediately recruit a Superintendent of Schools.
3. To actively and immediately recruit a Secretary-Treasurer.
4. To select a location for the Ebony Pines Regional Division school board office.
5. To arrange for the establishment of all legal elements for a new corporate entity.
6. To establish a list of recommendations for the interim board.

The list of recommendations cited the following as priority issues for the interim board.

1. While the interim board would take over the decision-making and policy-setting functions effective January 1995, the day-to-day operations of all three present school systems would continue until the end of the 1994-95 school term.
2. Effective January 1995 two current Superintendents of Schools would be appointed as Associate Superintendents until the end of the 1994-95 school term. (It was assumed that one of the existing three Superintendents would be chosen as the Regional Superintendent.)
3. The present jurisdiction offices would be operated as sub-offices until the end of the 1994-95 school term.
4. The interim board in association with all stakeholders would begin the process of establishing new policy and guidelines for the new school division.
5. The interim board would determine its 1995-96 staff needs and carry out recruitment as soon as possible.

On September 22, 1994 the transition team met once more in an attempt to decide where the new Ebony Pines central office would be located. No decision was made regarding location at this meeting, but a number of proposals were presented and board

members were asked to consider the options. The transition team decided to hold an open competition for the position of Superintendent. The Alberta School Boards Association was asked to assist and advise the board in the selection process. It was also decided that the selection of a Secretary-Treasurer be delayed until after the selection of a Superintendent.

Agenda items at the October 21, 1994 transition team meeting included the decision to locate the Ebony Pines Board offices in the existing County of Elcot building. The building would require some renovations to accommodate the new division offices. It offered the most central location and greatest opportunity for space. All team members agreed that the construction of a new building was not necessary. A bank was chosen to handle the financial dealings of the division. A school tour schedule was established providing the board an opportunity to visit and view all of the facilities in the division. To keep the schools and central offices in each of the amalgamating jurisdictions informed of the transition team's decisions, a News Bulletin was prepared and distributed after every transition team meeting.

Shortly after the October 21 meeting, a short list of candidates for the position of Superintendent of Schools was prepared and these people were then interviewed. To ensure that one jurisdiction, namely the County of Elcot with its four trustees, would not be able to singularly elect their former superintendent (4/7), it was decided that the successful candidate would require at least five of the seven votes. Substantial politicking went on between the two larger jurisdictions, as they both wanted their former superintendent to get the position. In the end, the superintendent from Bowlen was offered and accepted the position. Politically it appeared to be a good decision. Neither of the larger jurisdictions felt as if the other had won, and both reported that the successful candidate was an excellent choice. The superintendent was appointed effective January 1, 1995.

At the next transition team meeting held on November 24, 1994, the other two superintendents were designated associate superintendents for the Ebony Pines Regional

Division. They would continue to be responsible for their respective jurisdictions through the office of the newly appointed superintendent. One of the former superintendents subsequently accepted a severance package and resigned on August 31, 1995. The remaining associate superintendent was offered the designation of deputy superintendent as of September 1, 1995, and readily accepted it. Salaries and benefits did not change for any of the superintendent positions.

Once the new superintendent had been appointed, a new secretary treasurer had to be hired. The two existing secretary-treasurers were interviewed and the individual from the County of Elcot was offered the job. The unsuccessful candidate received a severance package and left the school jurisdiction.

A code of ethics for school board members was developed by the interim board and an organization chart was designed to serve as an interim guide to the administrative structure. The new organizational structure showed the superintendent responsible to the board and the associate superintendents and secretary-treasurer responsible to the superintendent. Each associate superintendent and the secretary-treasurer had direct line responsibilities for certain management areas. One associate superintendent was responsible for instructional and student services, the other for administration and personnel, and the secretary-treasurer had responsibilities in the area of school and system finances. Principals and schools reported directly to the superintendent.

The December 7, 1994 meeting of the transition team reviewed the organizational structure, outlined the secretary-treasurer selection process, established a number of board committees, and discussed the division of assets between the existing school divisions and their municipal counterparts.

The final meeting of the transition team was held on December 19, 1994. An acting secretary-treasurer was appointed for the period from January to August 1995. Signing officers were selected and credit card allocations were established. Regular board meeting dates were approved and honoraria and expense allocations for system business were

established. Transition team members were recognized for their efforts and service in getting the new regional division up and running. With the initial phase complete, a new story could now begin.

The organizational meeting of the Ebony Pines Regional Division was held on January 4, 1995. The new board appointed by the Minister was comprised of all the transition team members except for one individual who did not want to continue in the position. All of the recommendations previously made by the transition team were reviewed, called to motion, and approved. These motions officially and legally approved the following seven recommendations:

1. that the appointments of the superintendent, deputy superintendent, associate superintendents, and secretary-treasurer be confirmed
2. that interim signing officers be given authorization
3. that the Ebony Pines staff be informed that there will be no change in the day-to-day operations for school-based staff
4. that each jurisdiction operate its schools under current policies until the policies are updated
5. that Jubilee Insurance Agencies Ltd. be designated insurance carriers for Ebony Pines
6. that the Toronto Dominion Bank be designated as Ebony Pines banking institution
7. that the Alberta School Employee Benefit Plan life insurance premiums for trustees be paid by the Ebony Pines Regional Division.

Ebony Pines Regional Division was now a newly established school division. From concept, to discussion, to implementation, the process to consolidate three independent school jurisdictions into one regional division took nearly a full year.

CHAPTER 5

Research Findings:

The Story of Ebony Pines

In the story there are many stories. We are torn apart by the demands of different stories. We are criss-crossed by words and sentences. We are articulated by the story, permeated and formed into relevant being in the image of our story. We are also shaped through the hidden rules of story telling that we inherit. There are powerful structures built through our culture, in language, custom, and convention. There are those in positions of given power, the engines of orthodoxy, who are allowed to speak, to be taken seriously, to be listened to. And there are many others who do not have such rights. (Mair, 1988, p. 127)

Introduction

Through the use of in-depth interviews, this study examined the transformation of a newly consolidated school division. The interview data were analyzed to determine the impact of restructuring on this jurisdiction. To achieve this end fourteen individuals shared their stories for this research. As the respondents related their stories and the situations which led them to their present positions, the complex and multidimensional aspects of restructuring began to emerge.

The respondents were very willing and enthusiastic to share their perceptions of the reorganization. They contended that their experiences and observations needed to be voiced, so that others could understand what they went through, and what others may have to go through, in a similar restructuring process. Many of the participants perceived themselves as leaders in the educational merger domain as they believed they took a proactive approach to consolidation. The willingness to share and improve the process aligned with Levine and Broude's (1989) perceptions that as trainers are trained and they in turn train others, participants are able to refine old skills and acquire new ones. In the process, they reported a sense of satisfaction and rekindled enthusiasm.

Most participants commented that they felt safe and comfortable as each interview was held at a location of their choice which occurred within their own office, classroom, boardroom or other place of work. The result was a non-threatening atmosphere where respondents felt relaxed and willing to share their experiences related to the impact of merging three distinct school jurisdictions into one. A semi-structured questionnaire was used to elicit responses, and supplementary probing questions were used to extract additional detail and clarity. This non-threatening atmosphere resulted in responses which appeared to bring out individual respondent passions and personalities. Lieberman and Miller (1979) support this approach indicating that when gently pushed, educators are more willing to discuss feelings of ambivalence, conflict and frustration in the day-to-day activities of their work.

All but one of the participants in the study had a good general understanding of the process of consolidation as it affected them and their respective positions. The steps and details of events appeared to lose clarity and consistency as roles were distanced from the school board and superintendent level. Those participants who were not directly involved in much of the discussion and decision making related to the entire merger process provided only an overview of the proceedings. However they were able to adequately provide their thoughts and perceptions relative to other aspects of consolidation.

The purpose of this chapter is to present, from the perspective of those interviewed, the story of the restructuring process in Ebony Pines. This story is presented within the six main descriptors used to group the interview questions. These are: (1) the restructuring process itself; (2) the new organizational structure; (3) efficiency and effectiveness; (4) students and programs; (5) personal impact on respondents; and (6) the overall positive and negative impacts of restructuring.

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Themes

Restructuring Process

In addressing this theme, participants were asked to provide their perceptions and understanding of how the restructuring process was instituted and implemented. Many of the respondents used the terms regionalization and amalgamation interchangeably in their interviews but did understand the statutory differences as outlined by the Minister and the Alberta Department of Education.

At the time of interview, participants perceived the restructuring process to be near completion. The legal and procedural requirements as outlined by Alberta Education were all in place, leaving only a few minor structural and operational issues to still be reviewed and ironed-out.

Respondents from Bowlen and the County of Elcot indicated that working together and sharing services had been occurring between the two jurisdictions well before the January 1994 educational restructuring announcement. Administrative meetings, professional development programs, and joint ATA meetings provided the opportunity for personnel from the two jurisdictions to work and plan together. This sense of teamwork provided for increased communication, enhanced programming and some cost efficiencies. After the Ministerial announcement, each jurisdiction embarked on its own path that eventually led to the formation of Ebony Pines Regional School Division.

Ted, the superintendent of Bowlen, indicated that before any decisions were made, the board took the opportunity to look at a couple of possible alternative mergers. Ted stated that:

One of the things that we had to do was to take a look at what each of those two choices had for us. It was a matter of developing criteria with the board that we could use rather objectively to judge each situation and decide whether it would be more advantageous to merge with the County of Elcot to the south or Pacific County to the north.

Being a very small school system, geographically located between two larger jurisdictions, made the decision even more difficult. The school district and community of Bowlen had many ties with the two surrounding jurisdictions. Ted described the existing relationships in the following way:

As a small business community, we are very closely tied in a number of ways with the areas surrounding us. Shared services like fire-fighting and recreational agreements have been established with both adjacent counties. Some of our trustees also served as municipal representatives and they had a lot to do with the county north of us.

Ted also indicated that there was a mutually beneficial relationship that existed between the teachers' groups and the school jurisdictions before the merger. Teachers employed by Bowlen belonged to the Alberta Teachers' Association Local of Elcot and the school principals from Bowlen were part of the Elcot Principals' Association that held regular monthly meetings about current administrative issues. Professional development activities, conventions, and school calendars were all jointly planned.

Deciding which jurisdiction to join with was not an easy decision. As the superintendent, Ted maintained that he had to listen to all sides and provide the board with the best possible recommendation. Ted also commented that both sides had numerous benefits to offer Bowlen. He stated that:

There were a lot of considerations to review. The town and the business organizations tended to lean more towards joining the north, and the school personnel with the south. The decision as to which jurisdiction to merge with was really a major decision for the future of our community and schools. I knew, as the superintendent, that either way would create some difficulties.

Ted also stressed that difficult decisions were not only made by the existing boards at the beginning of the process, but also by the trustees who were chosen to sit on the transition team after the decision of which jurisdiction to merge with had been established. He indicated that one major decision was the selection of trustees who were to sit on the regional transition team. Elcot chose four trustees, Pearl City two, and Bowlen one. The current superintendents and two secretary-treasurers also served

on the transition board. Ted identified additional concerns which the transition team had to deal with:

The first order of business was to pick a name for our new jurisdiction. We then had to determine a location for the central office that would serve the needs of the entire merged division. An extremely time consuming task was to work through the assets and liabilities of each jurisdiction and to make some decisions in terms of policies and what we were going to do and how we were going to operate in the new year. The next big decision, and maybe the most political, was to pick the new superintendent for the division. After hiring the superintendent would come the hiring of a secretary-treasurer and other staff.

Ted reported that many of the decisions that had to be made by the transition team were very difficult, complex, and political in nature. For Ted, it appeared that decisions took a long time, because, for the most part, the transition team wanted to make the best possible decisions that would show no political bias. He described some of the decision making processes related to the location of the central office as the first of these politically sensitive decisions:

A real difficult decision was choosing the best location for the new central office. We had to look at the size of the system, and determine where it would best be located. This was a decision that people had to wrestle with, and it seemed to become sort of a political tussle mixed with a lot of reality. We had to determine what was central and accessible to everyone. Was there an existing building that would be suitable or did we have to renovate? Or, would we have to find money to build a new building? It wasn't an easy choice and it didn't happen over night.

Other decisions, like the selection of the superintendent, were also time-consuming, complex, and political in nature. Ted outlined the superintendent selection process:

I think even in terms of the selection of the superintendent, it was very political. Bowlen was the smallest jurisdiction with only one trustee on the transitional team. Elcot had four and Pearl City had two. As people were looking at this, they quickly realized that if you could count to four you could pretty well decide which area was going to have their choice of superintendent, and that was the County of Elcot because of their majority.

As the process unfolded, Ted indicated that the Bowlen representative felt that this didn't seem fair and was going to propose an alternative plan from the existing simple majority vote. The representative first indicated to the entire committee the need to work together and make good decisions, decisions that were based on trust and were

committed to the best interests of the new jurisdiction, its students, and its rate payers. The transition team was reminded that it was their duty to pick the best qualified candidate for the job of superintendent and by taking politics out of the decision process, this could occur. Ted outlined the resulting plan:

The suggestion put forward by the Bowlen trustee was that in order to name anyone as superintendent, the successful candidate had to get five votes of the possible seven, instead of the majority four votes. By making it five votes, it automatically meant that no one group was going to dominate the selection process. The successful candidate, the superintendent from Bowlen, got six votes. I think that was politics at its best.

Nick, an associate superintendent with the County of Elcot also identified a number of difficulties facing the amalgamating boards. He described the initial process this way:

During the first part of the process there was a real willingness on the part of each board to find the best possible partners for the jurisdictions to amalgamate with. There were a number of possible options surveyed by each of the boards. I think a lot of research, in terms of philosophy and system operation, occurred before the decision was finally made to talk to and pursue the merger of these three boards.

Nick commented that, "once the shuffle to find the right dance partner was over" the right decision was the merger of the three boards situated in the geographical area of the County of Elcot. Although geographically appropriate, Nick felt the match did come with some historical baggage. The city and county had separated about a decade earlier, and this tenuous relationship would pose some interesting questions and concerns throughout the consolidation process. Many obstacles related to tradition and past hard feelings had to be overcome.

Though Nick's interpretation of the relationship between the county and the city was not very detailed, he perceived the relationship between the county and Bowlen as positive. Like Ted, he indicated that Bowlen had to make some difficult decisions relating to which jurisdiction, north or south, would make the best union partner and provide for the best educational opportunities for its students.

Nick stated that:

Bowlen had some difficult decisions to make. In fact they had presentations from both divisions to consider. In the end they felt it was in their best interests to end up in a partnership with the County of Elcot and Pearl City. It certainly wasn't without major resistance in these three districts or other parts of the province. The process, once it got going, made sense. Along with it, of course, came the natural kinds of difficulties that a 'marriage of convenience' or whatever you'd like to call it, brings about.

The decision concerning partners for the merger was no easier for Pearl City.

When the minister made his initial announcement regarding the reduction and restructuring of school boards, Pearl City did not believe that the government would force them to amalgamate with any other jurisdiction as they were a fairly newly incorporated city that had separated from the county about a decade earlier. Participants from Pearl City indicated that they had a very effective and efficient district that was providing their students with an excellent level of education. Per student expenditures were lower than those of surrounding jurisdictions, and provincial achievement exam results were consistently above provincial average. Through the eyes of the superintendent and principal from Pearl, they perceived the district as a progressive and viable educational entity.

Greg, the superintendent of the Pearl City School District, appeared to be bitter, and his responses were often more negative than those of the other participants. Of the three superintendents he was the only one who did not remain with the new school system. He described the situation after the minister's announcement in the following way:

I feel that the vague and haphazard way Alberta Education went about amalgamating jurisdictions was totally inappropriate. It should have been up to the jurisdictions to decide if they wanted to merge and to start talking with other boards. It seemed to me at the time that the natural route to go was back with the County of Elcot, and Bowlen, because we were both within the county boundaries, even though the school boards of Pearl City and the County of Elcot did not get along.

The differences between the two boards appeared to be related to the separation of the two jurisdictions a decade before. Greg suggested that the inability to get along was a result of a political battle at the time of separation. He perceived it as:

A lot of politics. Local city politics against county politics. Ever since Pearl City became an independent school district about 10 years ago, there has been a split. It seems like these two boards have never been able to get along. Although amalgamating with each other seemed like the only logical thing to do, the city board didn't want to talk to the county board. If they would have had a choice, the Pearl City school board would never have contemplated going back with the county. It would have been an absolute 'NO'!

Before their May 1994 meeting with the Minister, at which point Pearl City was directed to merge with the County of Elcot, the board took the opportunity to meet with other potential partners. Greg described these meetings:

We even met with the Wetlands board, and some of the urban centers like Westbound City and Cannore City. Pearl City did actually meet at the request of Westbound City. They initiated that meeting. We did go to the meeting, but it didn't make much sense. If we were going to go in with anybody it pretty well had to be with the County of Elcot, and with Bowlen, which was also situated within the county. It made sense that they came in too.

Once it had been established that the creation of a new regionalized school division with Bowlen and the County of Elcot was the only viable option, the board of Pearl City met to pass a motion to proceed with discussions relating to the merger. Although the decision appeared to be relatively straightforward, Greg indicated that there was still some indignation and resentment on the board. He explained:

Although it seemed very obvious to me that the Province was going to mandate a merger between Pearl City, Elcot, and Bowlen, the board was not convinced and remained split on the issue. Two board members definitely thought we should fight it out. And as I said before, philosophically, the entire board was opposed to the amalgamation. But the handwriting was there.

In the end, Greg convinced the board that there was no point in fighting something that was going to occur anyway. After much debate, the board decided they had no choice and realized that it might be better to take an active role in the process than to have more decisions made for them. In no way did Greg perceive this to be a voluntary process. He stated:

Volunteer? No way! The board didn't volunteer to it. It was because they had no choice. There was no point fighting something that was going to be forced upon you anyway. And so, we started meeting. The county, of course, was happy to meet because this merger was just turning back the clock a decade or so to where the big guy would swallow the little guy. It was back to the way things were before.

Being from the largest jurisdiction, and central to the regionalization discussion, Bill, the superintendent of the County of Elcot saw the preliminary discussions in a slightly different light. He said:

The three systems that eventually did merge to form Ebony Pines were, sort of, friends before regionalization took place. For example, about 10 years ago, Pearl City had actually been part of the County of Elcot. And Bowlen, which is actually situated inside the county boundaries has always been closely associated with us.

Bill agreed with Ted that Bowlen and the County of Elcot did work closely together in a number of areas. Superintendents and principals met on an administrative level and teachers conducted professional development activities and ATA business together. Because of these positive past relationships, Bill contended that the fit was right to begin merger discussions with Bowlen. Although the "natural" amalgamation seemed to be the union of the jurisdictions within the county boundaries, discussions with other school systems did occur. Bill explained that the county board wanted to explore all options before making their final decision. Initial discussions were with the jurisdiction directly to the west, but size, distance, community and business relationships did not make this a viable alternative. Subsequent discussions took place with school boards that would have resulted in non co-terminus boundaries. Bill reported that:

Early in the process, there had been some talk at the board and community level of amalgamating with the County of Wetlands and/or the City of Westbound. In the end, we decided that we really didn't have too much to do with the County of Wetlands or the City of Westbound. It would have been a lot more work to make that union work. The boundaries and distances involved would have made the new region very difficult to administer.

As with Bowlen and Pearl City, once the preliminary discussions and reviews had been conducted with alternative jurisdictions, the County of Elcot took the next step

of getting together with Bowlen and Pearl City to begin exploratory discussions. Bill described the process:

Once we decided that this was going to be the best option, what needed to happen was to have exploratory talks involving all the elected officials. Initial meetings began with the mayor of Pearl City and the Reeve of the county. The Reeve was also a school trustee at the time. They discussed a number of issues related to teamwork and land use that needed to be addressed before getting their respective boards to meet. Once they had established some ground rules, meetings with elected officials from the three boards began to take place.

Like Greg, Bill indicated that there was some friction between the City of Pearl and County of Elcot elected officials, but once they had met and decided that they had to work together to make this process work, they appeared to overcome their differences. Bill maintained that the positive relationships that existed among teachers, administrators, and schools assisted in getting the elected officials to work together.

Those individuals who were involved in the process from the very beginning, and became part of the transition team, were able to provide more detailed accounts of the proceedings. Of the three trustees interviewed, Lorna, the trustee from Pearl City was the only one that indicated she did not have a very good appreciation or understanding of the process that led up to the merger and did not feel comfortable in discussing it. Brenda, the Bowlen trustee who was involved in some of the preliminary discussions, but was not a member of the transition team, offered this perspective:

I can only speak for what I know of Bowlen, and why they joined with Pearl City and the County of Elcot. I guess it was just assumed that they would be together. As far as I can remember, I think that the town of Bowlen voted for, or maybe they held a petition as to where they wanted to go. The people wanted to go with Elcot, and be in this area, in Ebony Pines, because it suited them. A majority of people go south to Pearl City to shop, they usually don't go north.

The third trustee, Sonia from Elcot, indicated that discussions associated with the sharing of services had been going on before the Minister made his announcement. The county and Bowlen had been working cooperatively on many projects for a number of years. They had a unique relationship. Cooperation existed in the form of

professional development activities and administrators' meetings. From Sonia's perspective, "cooperative things were happening between our districts." A number of aspects of the relationship were not well known or publicized but many positive things were occurring at the school, teacher and administrative level. Sonia stated that:

The reason for them happening was obvious. Economies of scale. The merger wouldn't increase the geographic perimeter of our district. It would remain the same size. We were just looking at making things more efficient by bringing independent units from within one geographical area closer together.

Sonia indicated that had the government not stepped in with their forced amalgamation program, economics would have dictated that these jurisdictions and others across the province amalgamate on their own. She stated that the government beat them to it, but had the government not mandated the mergers, Pearl City would have been a real challenge to convince. Like Bill and Greg, Sonia indicated that there were some, "ill feelings between Pearl and Elcot that stemmed from their separation that occurred about a decade earlier."

The three principals interviewed were more skeptical of the process than were the trustees or central office administrators. They perceived that the decision of who was going to be amalgamated with whom, was predetermined, and the big jurisdiction was simply going to swallow up the smaller ones. Jane, from Elcot, had a difficult time understanding why the government would want to change things in school jurisdictions that were doing well financially and academically. She stated that, "all three districts had excellent programs and achievement results. If there were jurisdictions that were in financial trouble, why not just deal with them instead of making everyone change." Part of her concern centered around the lack of participation in the process and of input from teachers, principals and parents. The government kept saying that they wanted more parental participation in education, but during the amalgamation process it appeared that they had none. Jane added:

There was a lot of skepticism. I'm not too sure that all the partners really wanted this. We had three excellent jurisdictions. Bowlen had a strong program. So did Pearl City and the County of Elcot. All three jurisdictions

knew that we would be forced to come together as a unit. At the beginning people were resentful of being forced to have to do that without any input.

Unlike Jane, Larry from Bowlen reported that there was a lot of discussion about which jurisdictions would be the best partners in a merger. There appeared to be some choice, but remaining as a distinct school district was not one of the alternatives. Although there was ample discussion, and the perception of choice, Larry suggested, "It was a shotgun wedding." He said that the only alternatives offered to Bowlen, was either to go with Pacific County to the north, or merge with the County of Elcot directly to the south. He also reported that at the time, "The Bowlen Chamber of Commerce put on a strong lobby for a union with Pacific because of the proximity and the business association with the communities to the north of town." Larry surmised that:

From the board's point of view, they felt that going with the County of Pacific we'd be a small entity just absorbed into a larger one. It was felt that we might have more impact, more independence, more of a say, if we went in with the County of Elcot and Pearl City. There was quite a lot of discussion, and eventually we did go with Elcot and Pearl.

Glen, a Pearl City principal, reiterated Larry's perceptions that the merger was, "strictly a forced marriage, no negotiation, and people didn't want it." Having been in the district when Pearl City had become a city and subsequently separated from the County of Elcot, Glen could identify with his school board and perceived a number of negative aspects associated with the merger. Now, as a principal in one of the Pearl City schools, Glen saw his role become one of buffer during the regionalization process. His main concern became keeping the staff and school community in a positive frame of mind, no matter what the outcome. Early on in the process, he, like the other principals, realized that there would be little or no input from the school level, and that consolidation was going to occur across the province. The best thing to do was to let the trustees and central office deal with it. Schools still had the responsibility of teaching children. Glen voiced the position that:

The biggest thing at the school level was to try and keep the school from getting involved because it was a very negative process. When you amalgamate, there are winners and losers, and our central office was in a bad

position because they had the minority vote on the amalgamating council. It was pretty obvious, right from the onset, that politics was going to govern, and there really was no democratic process.

The teachers who were interviewed, like the principals, commented that they were not adequately involved or informed in the decision making process leading up to regionalization. They assumed it was a provincial directive that was meant to save dollars. Mike, a junior high school teacher from Pearl, explained he had assumed that the three boards got together after the province had indicated they had no choice but to amalgamate. Based on what the teacher respondents said, it seems that from a teachers' perspective they were not involved in the process nor were they actively informed about what was occurring. Mike stated:

I wasn't privy to those discussions. I'm not sure that everybody agreed on who the partners should be, but I think the city and the county were a very logical choice. I don't think anyone would argue with that. Whether Bowlen should have been part of the merger or not, I don't know.

Andy, from the County of Elcot, supported Mike's position by stating, "The limited communication provided to teachers did not give them enough information to fully comprehend the process or decisions involved in the merger process." He further explained, "I just automatically assumed Bowlen, Pearl, and Elcot would amalgamate."

Andy continued to explain this view point:

There was some talk of other districts joining, but these three joining was pretty much expected. It made a lot of sense in terms of geographic location. In terms of the process, I'm not really aware of any teacher input. Knowing what the government was trying to do across the province, it was pretty much a given that the three of us would end up together.

Sam, a long time high school teacher from Pearl, saw the process in a similar fashion:

I saw it as a political edict from the provincial government. I don't believe that any of the people who were involved had an opportunity to provide input, least of all the teachers. I don't recall any formal attempt to keep me as a teacher, parent, or taxpayer informed of what was happening. It was something that I viewed as happening to us, as opposed to us being actively involved in the process.

Sam said he was personally quite pleased with the overall message the government was giving. He stated that his understanding of amalgamation was that administrative costs at the board and central office level would be drastically reduced and the savings passed on to the students and classrooms of Alberta. Sam, speaking as a concerned Albertan, reported:

It didn't bother me that regionalization was going to occur. From a taxpayer's point of view, I was happy about it. I thought it was an excellent idea that was way overdue. Any time you are able to get additional funds into the classroom, at the expense of the organization of the school district, I think it's a good idea.

Sam also provided additional perceptions and feelings from other teachers who had shared their thoughts about the process with him. He said:

There was the perception among teachers on my staff that it was a corporate takeover. Everybody with whom I talked felt that way. Even people within the county whom I know fairly well said that it was directed from above. That's the way it was presented to them.

Although most of the participants saw little opportunity to become involved in the process, some did suggest that things could have been done differently and there could have been alternatives to consolidation. Ted, the superintendent of Bowlen, said he felt strongly about the direction educational restructuring was going in the province. Counties had been established about a half century before to consolidate services, and to save tax dollars. From his perspective, some districts had done an excellent job of providing educational and municipal services to their constituents. Now the government was going to change all of that and go back to specialized service areas. He explained that the province should be doing more in the area of consolidating services, especially for children. Ted also stated that choice is a good thing and added:

If regionalization provides students and communities with greater choice in services and programs then it could be good for education. More choice and more opportunities would create a more viable education system in Alberta. The top down approach to change seldom achieves the desired effect.

Other things that Ted indicated could have been done differently were:

For one thing, the trustees should have been allowed to keep their positions until the next election. It didn't make any sense to me to go through all those changes. It was a waste of time and money. It also would have been much

better if they had combined various services in each of the communities. This would have retained a sense of community identity rather than the negativism that existed with the regionalization and creation of a new bigger school system.

Sonia, a trustee from Elcot, also indicated that school jurisdiction merger was not the answer to the problems being faced by education today. She said that the province simply made changes for the sake of change. From her perspective, before proceeding with a provincial wide move to restructure school jurisdictions, a workable plan with viable strategies and alternatives needed to be established. Her understanding was that there were no clear goals and directions provided to boards that outlined the government's vision for education. It was all done so quickly without any thought as to the outcomes. The bottom line appeared to be dollars and cents. In her words:

Whether it's the health boards, school boards, or whatever, as far as I'm concerned it all had to do with money. I can appreciate that we need to take control of our finances as a province and as a country, but I think there are much better ways to put the plan in place and carry it out without affecting people negatively.

Like Ted, Sonia also expressed disappointment that the province missed a golden opportunity to consolidate children's services. As a veteran school trustee she indicated that:

For years, the Alberta School Boards' Association has asked for better co-ordination of children's services between health, justice, social services and education. There is a definite need for better co-ordination and greater communication. This is not at all what we asked for when we asked for co-ordination of children's services.

Although the merger process was viewed by participants in a variety of ways, most indicated that they were not pleased with the process or results. Some respondents stated that more communication and participation needed to occur before the government imposed the process. Still others stated that the opportunity for real educational change was lost because of a poorly planned process.

Organizational Structure

The theme heading, organizational structure, encompasses a number of sub-themes that make up the configuration of the Ebony Pines Regional School Division. Participants provided their perceptions and understanding related to the central office structure, system size, policy, culture, and effect on personnel.

Central Office Structure. Before regionalization occurred, each of the school districts had developed its own central office structure. These administrative units were reflective of system size, needs, and budget allocation. The smallest district, Bowlen, had only one central office administrative position, that being the superintendent. The finance department was a shared responsibility with the town. Maintenance and public works were also shared with the town. All schools and principals reported directly to the superintendent.

The Pearl City School District did not have a much different central office configuration than Bowlen, other than they had their own secretary-treasurer. The superintendent was the chief executive officer of the board and all schools and personnel reported directly to him.

The largest of the three jurisdictions was the County of Elcot. Elcot had a superintendent of schools, a deputy superintendent, an associate superintendent, a secretary-treasurer, a district psychologist who, as director of special education, was in charge of special education programming, a director of transportation services, and a director of buildings and maintenance. The office space and some clerical and maintenance personnel and services were shared with the county's municipal division.

In total, the three school systems had three superintendents, one deputy superintendent, one associate superintendent, two secretary-treasurers, one director of special education, one director of transportation services, one director of buildings and maintenance, a number of secretaries and executive assistants, and a number of support

personnel in both transportation and maintenance. There were a total of 10 central office administrative positions. After the merger of the three jurisdictions, the administrative structure that was adopted and put in place closely resembled that of the County of Elcot. The new organization had a superintendent of schools, one deputy superintendent, one associate superintendent, one secretary-treasurer, one director of special education, one director of transportation, one director of buildings and maintenance, and a number of support personnel. The new division now had its own offices and did not share facilities or personnel with any other government arm. This new jurisdiction, with its revised organizational structure, had a total of seven administrative positions and seven trustees. This was a reduction of three central office administrators and 19 trustees from the total number of trustees and central office administrators previously in the three jurisdictions.

Henry, the current secretary-treasurer and previous interim committee team member, commented that:

There's obviously been some savings to the government because there are fewer positions. I guess there are some economies of scale in the governance and administration areas. We have less staff. We obviously also have a lot fewer trustees. The county had 14 trustees, and another seven in Pearl, and Bowlen had five. We had about 26 trustees in the three jurisdictions and now its down to seven.

Henry was quick to add that funding for education comes from the provincial government, so any savings realized through the reduction of staff in the three merging jurisdictions stays with the government. He indicated that, contrary to popular belief, the savings do not translate into additional dollars for the division, its students, or its classrooms. Henry further stated that, "I believe this is one area that has been greatly overlooked and certainly misunderstood by the public." He said that the government did not adequately inform school boards or the public as to where the savings realized from amalgamations was to go. After the consolidation, the new jurisdiction would be getting less money from the province for the education of the same number of students.

The central office participants generally indicated that although the organizational chart had not been radically changed, the way in which the new central office operated had.

Ted's interpretation of the new organizational structure indicated that, "in actuality the way it's structured, I suppose, it's not too different than what it was, but in theory it certainly conveys the message that it is different than the old model." Ted reported that the old structure created a system that had a long chain of command where the superintendent reported to the board, the deputies reported to the superintendent, the principals reported to the deputies, and the teachers reported to the principals. The intent of the new system was to create an organization that was more consistent with a site-based decision making model. Decisions were made where they would have the most relevance and impact, usually at the school level, therefore, all principals reported directly to the superintendent. Deputies were considered resource personnel that administered different aspects of the organization.

Nick's perception of the new system was similar to Ted's. Nick also indicated that on the outside the organizational structure looks very similar to the old county system, but it does not operate in the same fashion. He explained:

Well, there is still a structure in place but, with site-based management and regionalization, and the timing of the two, the system doesn't, and can't operate the way it did before. It can't. Central office plays much more of a facilitative type role than it did previously.

The trustees, like the central office administrators, also reported that the administrative structure at the central office level had not radically changed. What did change was what administrators do and how they approach their roles.

Sonia, the trustee from Elcot, described the changes in the following way:

We had three very different management styles. I saw it as management by walking around, management by collaboration, and management by 2 X 4. When you are trying to blend those philosophies together you need to stretch and bend. So, I guess we had to blend and extend to meet the needs of the new jurisdiction and accommodate the move to site-based decision making.

Sonia also stated that the previous organizational systems that operated in the different jurisdictions no longer exist. The new system has created a much wider and flatter organization. There are more people taking responsibility for more aspects of the organization. Sonia also commented that, “management by walking around, management by collaboration, and management by 2 X 4 is no longer appropriate, and no longer here. We are into a new era.”

The principals interviewed perceived no change in the way the administrative structure was organized. Jane, a middle school principal from Elcot, summarized what she believed were the feelings of the principals by stating, “The structure that is in place is very much the old county one.” Larry, a middle school principal from Bowlen, offered some further insight and clarity by stating that:

The significant day to day operations and decisions are still the old County of Elcot system. I think it could have been handled more effectively. If they had brought in new players it would have had a real impact because there would have been no old loyalties, relationships, or prior deals. It was not a fresh start. It was how to preserve as much of each of the three former jurisdictions. The closer you got to the top, the more they protected the old way of doing things.

Through his discussion with colleagues across the province, Larry commented that other newly regionalized jurisdictions appeared to have missed the opportunity to change the status quo and develop a whole new approach to central office administration. He interpreted this to mean that the main goal for central office administrators was to preserve the old system, and keep as many of the old guard in their administrative positions. He suggested that in the end the schools and teachers were the ones who would have to suffer through the changes and reduction in funding while the “old boys club” in the central offices across the province were, “still trying to function the same as they did 25 years ago in an old style, out-of-touch, system.”

Teacher participants had some slightly different perspectives. Andy, a teacher from Elcot, didn't perceive any difference from the previous County of Elcot organizational structure. Mike, from Pearl City, saw the overall structure as being the same but pointed out that there were a number of specialist support positions added to

central office to provide schools and teachers with much needed assistance. He also added that:

Although they may have missed an opportunity to change the organizational structure, I think they were wise in maintaining a relatively similar structure because if we'd come up with some other wild and wonderful formula for building our central office, they'd have lost a lot of credence.

Sam, a high school teacher from Pearl, explained that the existing structure had a negative aspect to it. "I don't think that it's a good idea to have a huge conglomerate of bureaucracy at the top. It almost looks like they added a layer of administration or bureaucracy."

System Size. The regionalization of Bowlen, Pearl City, and the County of Elcot increased both the number of students served and the geographic size for all three jurisdictions. The County of Elcot had virtually no geographical change compared to the other two systems. The district encompassed an area approximately 110 km long and 40 km wide, creating a school division of about 4,400 sq. km. The new division maintained the same county boundaries. Bowlen and Pearl were located inside these boundaries and added only slightly to the overall area of the new jurisdiction. Elcot had a student population of about 4,750 students housed in 14 schools. Bowlen's three schools had an enrollment of approximately 1,100 students, and Pearl City had been home to 2,650 students in seven schools.

All central office personnel interviewed had a positive outlook towards the size of the new jurisdiction both geographically and in terms of the number of students.

Bill indicated that 8,500 students might even be a bit low for the geographical size of the new division. He commented that the new system with its current enrollment could handle approximately 3,500 more students. A number of schools were currently under utilized and had room to accommodate more students. Many of

the communities in the jurisdiction would benefit from some additional growth. He also indicated that:

We now have the potential, especially with the current funding structure and the number of schools in the system, to handle more students. More students will bring in more dollars. Our financial position would greatly improve with the addition of a few thousand students. Given our current geographical size, we should be capable of schooling about 12,000 students.

Although Bill generally reported that the increase in size had an overall positive effect, he did see some down sides to being larger. Schools have indicated that they “never see anyone” from central office out at the schools anymore, and the reduction of trustees has created a lack of contact between the public and their local board members .

Henry, the new secretary-treasurer, agreed. The increase in the number of schools and students has greatly reduced personal contact and the opportunity for all members of staff to be involved and informed about the various things that are going on in the new jurisdiction. Visiting schools and classrooms was a valuable aspect of being a close-knit, family type of organization. Henry further stated that:

I think it is a good size as far as realizing the economies of scale. There is probably some research out there as to what is the optimal size, and I think it is probably between 8,000 to 12,000. I think if you get into anything larger than that, you’re not realizing the economies of scale because you will probably have to start duplicating some administrative positions and services.

Ted and Nick also agreed that 8,500 students was a good size for a school division of this geographic size. Both participants indicated that with the new types of technology available, communication should improve. Nick viewed the student numbers this way:

If I had to compare the size of the division to what we had before, I’d say this is a good size. This size provides you with options for students, personnel movement, and greater efficiencies. Yet we are still small enough to have some sort of personal touch with the schools, the administrators, school councils, and staff. My preference would be this size, but I’m sure we could grow another 1,500 to 5,000 students without much impact on schools or the system.

Nick stated that the geographic size was appropriate. He saw the 110 km by 40 km jurisdiction as “manageable.” With the central office located relatively in the centre of the jurisdiction, he indicated that it is no more than three quarters of an hour to

the farthest school. If the superintendent, central office personnel, or maintenance people need to make a quick trip out to a school, it could be done relatively quickly.

Principals agreed with the central office administrators that the new division was the appropriate size. Larry commented that both geographically and in terms of student numbers, Ebony Pines provided individuals with the opportunity to “build relationships” and provide for adequate “information flow.” Glen didn’t think that the jurisdiction was too large. His main concern related to the “diversity of needs” that existed within the various schools and communities across the division. His perception was that by increasing the number of communities and students in a system, the diversity of the student clientele could possibly increase. Increased diversity could mean more programs and an increase in costs.

Jane also perceived diversity as a major concern, but her interpretation of diversity was slightly different from Glen’s. Diversity for Jane meant an increase in the numbers of different types of schools. In a large system, there are many more elementary, middle, junior high, and high schools than in a smaller jurisdiction. Each of these school levels presents its own problems and concerns. She stated that if everyone wants something different, the system will have a difficult time in meeting all their needs. Jane further indicated that:

Geography, and the coming together of different systems that have done things differently, has caused some issues. In terms of us coming together as a team, we’re not there yet. The needs of the small schools versus the medium schools versus the large schools is still an issue. There has to be some giving and taking by all parties if we want to be successful. To date, I’ve seen the beginnings of some giving and taking.

In addition to the issue of diversity, Jane explained that the new system was, “just a nice size.” She further indicated:

Operating under a site-based management system has created a more independent relationship between schools. As schools, principals, and teachers get to know each other better, our spirit of system and collegiality will improve. We will become more at ease voicing our opinions and concerns.

For this reason, she perceived the creation of a new larger system having both positive and negative aspects.

Trustees were somewhat less supportive of the increase in size than the central office administrators or principals. Lorna, the Pearl City trustee, indicated that the increase in geographic size had decreased her ability to communicate as effectively with her constituents. Parents and community members were not able to deal with, or didn't feel as comfortable dealing with, someone they didn't know in the larger jurisdiction. Before the merger, she commented that she represented a much smaller area where everyone knew her and felt confident in approaching her and sharing their opinions. Her perception was that now, with the big wards, the level of involvement had drastically been reduced. Lorna further commented that:

The further away you are the less involvement there is. Having been involved in both the smaller and the larger districts, I see a lot of people grieving the loss of the personal contact we once had. From the point of a trustee, it is not as effective a system as we had before.

Lorna also repeated Glen's concern about diversity. She indicated that:

Optimum size also depends on the diversity of your student population. You can have a real homogeneous group, and 10,000 to 20,000 students in a system would be okay. But if you have a real diverse multicultural group, that has a large number of special needs students and programs, or a variety of different socio-economic levels, 10,000 to 20,000 students is too big. I would prefer the larger size with the more homogeneous grouping of students.

Sonia, speaking as the trustee from Elcot, contended that size was an important issue that was given a lot of consideration during the regionalization process. She commented that with the 4% administration funding cap and the larger geographic size, a lot of the administrators' time was being wasted on travel. Brenda, the trustee from Bowlen, had similar concerns related to size and distance. She suggested that the system could be a bit bigger but should not be as large as the health regions that were established. With anything bigger in size, you would lose any personal touch that now exists. She reported that travel from one side of the jurisdiction to the other currently

takes about an hour. If you have to travel for more than an hour it would be a waste of time and money. She described a number of other problems related to distance:

You wouldn't be able to meet enough. You wouldn't be able to get to know each other. I think a big part of our role as trustees is relationship building. We have to build a relationship where we trust each other, and are able to lean on each other. You wouldn't have that personal touch if somebody was so far away that they could only come to meet once a month. They wouldn't feel like they were part of the system.

From the teachers' perspective, Andy and Mike both viewed the increase in size as a positive move. Both indicated that the current size was "workable," "credible," and large enough to provide a much needed variety of resources. Andy also described a number of opportunities afforded by the larger district:

I don't think it's a bad size. We're a big geographical area. I like that opportunity. It gives you some more opportunities in terms of options like transfers. I think there is some money in central office that they're doing some creative things with: new and innovative projects like cyber-school and the store front school. I think these are positive things that provide teachers with more opportunities.

Sam had a slightly different outlook towards the increased size of the jurisdiction. He explained that the change in size has had a negative effect on how the system operates. His feelings related more to the effect on the local ATA than on the school system:

Before the regionalization we could hold a meeting on short notice in a small place. We could have the meeting right after school. Now we have to give advance notice and have to hang around until 5:30 which is roughly the time it takes for the people from the farthest outposts of our district to get here. It is very difficult to keep people here for two hours and then have them come to a meeting. Especially if they live far away. The result has been that we have had trouble getting as many people out. The percentage of people has dropped at our ATA meetings and at other functions like social events in the district. I would say it's a disadvantage.

Sam commented that another disadvantage of the larger jurisdiction, was that there were more people. He stated that, "the more people, the less opportunity there is of you getting to know all of them, or finding out what great things they may be doing in their classrooms that you could use." He explained that system functions become less welcoming because there are too many strangers and the sense of family, cohesion,

and communication becomes lost. Sam contended that, “any time you have more people, the chance of getting to know them is remote.” He further stated that, “all of your gatherings are diluted by a whole bunch of strange faces, people you don’t know. You lose that sense of team, and close knit communication.” Sam was adamant that smaller is better.

Policy. The question related to policy looked at the issues of policy creation and implementation for the new school division. Each of the previous school jurisdictions had its own distinct policy manual that had been developed over years of application and review. The consolidation of these three districts meant new Ebony Pines policy that reflected the diverse needs of a much larger and heterogeneous district had to be developed. During the merger process, the interim board passed a motion that allowed each of the amalgamating districts to continue to use their previous policy until new policy was introduced. One of the former superintendents was contracted to put together a new policy handbook for the newly established jurisdiction. Policy development was a division-wide project that involved various stakeholders in both the system and community.

Ted began his description of the policy development process by stating that they had to do a couple of things differently. The first thing that was decided, was that the board was not going to follow or adopt Bowlen’s policy, Pearl’s policy, or the County’s policy. This was necessary to curb the feeling that the County of Elcot, because of its size, and number of trustees, was going to dominate the process. Secondly, a policy development committee was established with one of the previous superintendents at the helm. Funding was provided by the board to establish the committee and get them to quickly begin the difficult task of developing new policy.

The way Ted described it, the committee borrowed the best things from each of the three jurisdictions, but never took one policy per se. Ideas were generated by the

board and various stakeholders. All groups were asked what they wanted to see incorporated. The result was a “made in Ebony Pines,” type of policy.

Ted continued to describe the process as one of collaboration and consensus building. Policy statements were first developed by the senior administrators through the contracted ex-superintendent. Ted, the newly appointed Ebony Pines superintendent, would then take the policy to the board to be approved in principle, or be sent back to the committee to change some aspects of it. Once approved in principle by the board, the proposed policy was circulated to all affected stakeholders. Ted indicated that these stakeholders included the school principals, school councils, school staff, local ATA, and often the bus drivers and support staff association. These groups were given a specified period of time to review the policy and provide feedback with any proposed changes. Ted reported that, “at this point, the committee would re-work the policy to incorporate any positive changes, and then take it back to the board for final approval.” Ted was very positive about the entire process and provided this account of the process:

The policy development process was a very arduous but positive experience. It brought the three jurisdictions closer together by having all of the stakeholders feel like someone was listening to them. All of the different groups provided excellent feedback on the way Ebony Pines should deal with certain issues. I was really impressed with the quality of feedback that we received.

All central office participants perceived the process described by Ted to be democratic and participatory. The other common view was that because of the diverse needs of the schools and communities in Ebony Pines, the new policies would need to be more enabling, to allow for greater local flexibility in their application by the schools and school councils. Nick explained:

Many of the policies that have been contentious have been written in such a way that they’re more enabling than directive, and that has managed to keep the school communities and the different jurisdictions fairly satisfied, so they don’t necessarily have to change a heck of a lot of things they are doing now.

Trustees’ perceptions of the policy development process was basically the same as the central office administrators’ perceptions. The three trustees agreed that the

process provided an excellent opportunity to develop new Ebony Pines policy, even though parts and ideas were taken from the previous district policies. An issue presented by trustees was that of the time constraints put upon them by the Government.

Sonia confirmed Ted's description of the policy development process and reiterated that the new policy handbook was a "made in Ebony Pines policy."

However, Sonia also had some misgivings. She elaborated:

One negative aspect of regionalization was the enormous amount of work required to be carried out with time limitations put on by the government. We had to steamroller some policies to get them in place on time. I don't think we did as good of a job as we could have, but we didn't have time to put as much time and public input in as we wanted. In some cases we took a little bit of one and a little bit of another to bring it together. In other cases we just abandoned them all and came up with something very new and innovative.

Brenda had similar concerns related to the time constraints and the adequacy of stakeholder input. She surmised that the way in which new policy was developed in Ebony Pines, followed an acceptable process. She stated that whenever a committee is delegated the job of "wordsmithing" a new policy, "they need to start fresh and create procedure that will serve the whole jurisdiction." Brenda further commented:

Policy is not forever. It can be changed whenever there is a need for change. Change can be good. If the social dynamics of the jurisdiction change, new policy can be created or old policy adapted to facilitate the new needs. Boards change and administration changes. New people will bring in new ideas. The result is new policy.

Teachers, like the trustees and central office administrators, felt positive about the way new Ebony Pines policy was developed. They indicated that they played an active role in the development process. The teachers all commented that no one jurisdiction dominated the development of new policies. Andy explained that, from the teachers' standpoint, "the board would share proposed policy so that teachers could have a chance to review it and provide them with feedback." Andy was confident that the teachers concerns and ideas were heard. From his perspective:

We had lots of opportunity to provide feedback on policy proposals. Although it's more the upper management level that formulate policy, we had a lot of

input into the final wording. Many times the board and administrators doesn't seem to listen to teachers' concerns, but this time, I think they did a good job in bringing all the ideas together. We can now all live with the new policies because we were part of their development.

Unlike the teacher participants, the principals had varied opinions on the issue of policy development. Jane and Larry supported the views of the superintendents, trustees, and teachers by stating that the process went fairly smoothly and the policies that resulted were adequate. Jane elaborated by saying:

They took the three policies and re-wrote them, and I think that we're pretty close to having them all developed. Change isn't that big in most policies. I believe that policy development was not an issue, not even the belief statements, or mission statement. Those were not issues. They came together rather nicely.

Larry's understanding of the process was that, "they just pulled from each of the three policies and tried to go with the strengths of each." Like most of those interviewed, Larry indicated that a collaborative approach with all stakeholders was used to develop the final policy. He reported that as a school administrator he had ample opportunity to provide input on new policy.

Glen, unlike the other participants, did not perceive any collaboration or creativity in the policy development process. He surmised that it was a one man show. Glen contended that:

Actually the policy development was kind of an interesting process. The policy that has been developed was created by one of the superintendents from the largest amalgamating jurisdiction. He was hired to write policy, so he went into his office and wrote policy. That is our policy. I'm not condemning the individual, but it's really difficult when you're in a situation where you're from one of the amalgamating bodies, not to write policy that's consistent with what you're used to. It was an interesting organizational choice.

Culture. Participants were asked to provide their perceptions on the process and formulation of a new organizational culture for Ebony Pines Regional School Division. The term culture was used to clarify jurisdiction identity or in Bower's (1966) words, "the way we do things around here."

All of the central office administrators interviewed indicated that a number of positive things occurred during the consolidation process, which assisted in the development of a new Ebony Pines Regional School Division culture. They also explained that jurisdiction “culture” was something that would take time to develop.

Ted stated that the birth of a new culture began with the establishment of the new jurisdiction. He commented that:

I think it had to do with the design of the board. Also having the superintendent appointed from the smallest regionalizing board ensured that the new district was not going to be just like Pearl or the County. Things were going to be done differently.

Ted, Henry, and Nick outlined a number of activities that were held to have people begin to identify with the new organization. Nick indicated that early in the school year, a number of staff functions were held to get people together, and meeting as a team. Some of these were social events, including an opening wine and cheese soiree, various Christmas activities, and a system-wide golf tournament. He added that the professional activities included school council involvement in system and board events, new curriculum committees, and a system wide goal-setting session for representatives of all stakeholders. Nick, speaking as an associate superintendent, reported that there was a conscious effort made by the superintendent to establish a better system of communication within the jurisdiction. These efforts included publishing a “Highlights Bulletin” after every board meeting, and creating a system newsletter that went out to all schools, school councils, and local newspapers. He also indicated that everyone was encouraged to “get out the good news about Ebony Pines” more so than was ever done in any of the previous jurisdictions. There was a specific push to include schools, school councils, and other stakeholders in the development of new policy. All in all, the board and administration wanted to build a strong family network. Nick further described it as:

. . . relationship building. When you have three groups getting together and deciding that this is going to be a marriage, they need to work out things like who’s going to take out the garbage, and how it’s going to be taken out. Every

part of that engagement was reviewed because it was a short engagement, but it looks like a long marriage, so we'll have to continue to work on a number of obstacles.

Being a new trustee who was not affiliated with any of the previous jurisdictions, Lorna stated that, "Ebony Pines was a new entity and the development of a unique culture would take time." Trustees Brenda and Sonia both agreed that it would take time to build a new identity, but also indicated that a number of activities were arranged to bring people together as part of the new team. Sonia stated:

We know team building takes time. But what is the best way to do it? We decided to have a number of celebrations like team building sessions with the board and administration. We had some administrative retreats to get to know the principals and central office administrators. We also had a number of social functions to bring all the staff from across the district together, and try to get to know each other as individuals.

The principals had a slightly different perspective on the development of a new culture for Ebony Pines. Working at the school level they did not perceive much of a change from before. Glen explained that there had been some effort put forward, but he didn't believe that you could develop a new culture. His view of culture was something that you grow into over time. He strongly supported what was happening in terms of communication and social events but further indicated that the system needed time to come together as a new team and a new entity. From his perspective as a principal from Pearl, he indicated that past differences would take time to resolve. He explained:

The problem I see with this whole business, is that there has been so much hostility that has come forward along the way. I think many of the circumstances that have caused the hostility are circumstances that are actually beyond the jurisdiction's control. What a lot of people don't realize is at the same time that we were going through this amalgamation process, there was a lot of money being taken out of education. People won't soon forget that.

Jane and Larry commented that the recent transfer of principals has helped in breaking down some of the old barriers, but that the system had a long way to go. Larry's perception of culture was based on who was in control of the organization. He commented:

The reality is that the bulk of the central organization is still all the County of Elcot. They even have the same secretaries. We're answering phones and managing the information flow through the same district office, so to a large extent it's still the County of Elcot, just bigger in some areas. I'd say that's going to be the biggest stumbling block to an Ebony Pines culture emerging.

Two of the teachers indicated that a new culture was slowly developing.

Initiatives that were introduced to get people together and better informed have greatly assisted in cultural development. Mike and Andy reported that during the merger process, people were trying to come to grips with and survive the changes that were occurring. Teacher mobility, principal transfers, and new curricular directives in the area of technology have helped in creating a distinct Ebony Pines culture. Andy indicated that the ATA had a lot to do with the positive cultural changes that occurred.

He said:

I think we're developing an Ebony Pines culture. A lot of it, I believe, comes from having a very strong executive at the local ATA level. We've got a president that is very effective and has done a tremendous job in terms of bringing people together. We're now one group. It's becoming very much an Ebony Pines organization.

Sam had a very different perspective on the culture of Ebony Pines. He said that nothing had been done to make people feel like it was a merger of three equal jurisdictions. Coming from Pearl, he perceived the re-union as, "a bit of a slap on the hand for having left the fold a decade before." He was convinced that:

The culture of positiveness and cooperation has taken about an 88 degree nose-dive since amalgamation. I don't believe they've done anything to make it feel like it was a joining of equals. Certainly nothing effective has been done to make us feel that it was a new beginning where we could grow, build, and improve. It was an oh! welcome back to the fold, here's the way we're going to do it, so keep your nose clean and keep quiet. Don't expect any special treatment, you're just one in the crowd. That's the impression I get.

Personnel. Before restructuring took place, the three independent school jurisdictions were relatively small in size and each regarded itself as close-knit and people-oriented. The perception, as expressed by the former superintendents and trustees of the new board and central office, reflected the need to maintain the same

sense of team, and to try to provide a smooth transition that would have minimal impact on people and their jobs.

Speaking as the superintendent, Ted's perception was that, "the process went as smoothly as could be expected, given all the changes that took place in each of the three organizations." He stated that, "the overall impact on personnel really only affected the trustees and central offices. A lot of time and effort was placed on buffering the schools from any negative impact associated with the regionalization." Ted was confident that the board was very sincere in its effort to treat, "all of its employees with the highest level of dignity and professionalism." He elaborated by saying:

That didn't mean we were going to sell the farm, but we were certainly going to make sure that our people felt like they were being treated as fairly as possible, even though some of them might lose their jobs.

Ted also commented on the impact the merger had on the former superintendents. As the new superintendent he indicated that the government placed an extremely high level of stress on all three individuals. They were asked by the government and their respective boards first to, find the appropriate partners, and then, to make the entire process work with no extra time, money, or support. This put them in a very stressful position, knowing that they were really creating a scenario that could eliminate their positions. Out of the three superintendents, Ted got the job as superintendent of the new jurisdiction. A second individual accepted the position as deputy superintendent in the new division, and the third decided to leave, taking a buy-out package. In the end, one superintendent received a bit of a promotion, one was demoted to deputy, and the third lost his job. Overall, Ted indicated that the, "regionalization process took a great toll on the superintendents, even more than on the trustees."

Commenting on trustees, Ted reported that they were faced with a slightly different problem. Although the total number of trustees was reduced from 26 to seven, their role in the process was limited to politics and policy. Ted surmised that

trustees, “being political entities, face the possibility of losing an election every three years.” This process just shortened the term of office for most of them. He indicated that many expressed the opinion that, “they were glad to be out during this time of change and fiscal reduction. They didn’t like seeing what was happening to education in general.”

Ted stated that the next most affected group was the central office support staff.

He explains:

As far as secretarial staff were concerned, I think we handled that really well. We didn’t make people apply for each of the new positions. We determined all the positions that were going to be available, named them all, and then had people indicate a first and second choice for any positions. There was also a 12 month severance package for anyone who wanted to leave. A couple of people decided to take the package and that reduced the numbers substantially. So in the end, I think that we had only one casualty of all our central office support staff. That was a person who got paid a severance package because they couldn’t be kept on. In terms of the personnel issue, I think people felt reasonably good about how we did it, and how we handled it. Throughout the process we were concerned about feelings and concerned about our staff. How you treat people tells you a lot about an organization.

In reflecting on the impact that reorganization had on school personnel, Ted indicated that it was very limited at that level. No principals, teachers, or school support staff lost their jobs or were forced to change roles because of the merger.

Henry, Nick and Bill agreed with Ted’s perception that the process had minimal effect on schools and their personnel. These same central office administrators commented that the process utilized at the central office level, treated people well and that only a few individuals lost their positions because of the consolidation. They further stated that anyone who did not remain with the new jurisdiction was paid a severance package. The former superintendents all agreed that throughout the merger, employees were made to feel part of the process and were kept informed of all changes. Because of the increase in jurisdiction size, support staff were informed that a majority of the positions would remain.

Greg, the only superintendent not to remain with the new jurisdiction, provided a different perspective. He indicated that even though only a few individuals accepted

the severance package, “the impact on those who were let go, was severe.” From Greg’s point of view, “which district you were from played a major role in the hiring process.” He described the impact:

There’s no question it was a takeover. The county assistants stayed, the maintenance people from the county stayed, even the county secretary treasurer stayed. The people in these positions from the other districts were let go. The secretary treasurer, Brian, got hit quite badly because he was only about 45 or so, and couldn’t find a job for about a year. He would have suffered the most.

The trustees, like the majority of central office participants, saw limited impact on school personnel because of the consolidation. They agreed with Ted, that the greatest personnel changes occurred at the trustee, and central office administration levels. Sonia described the effect on personnel this way:

We went from 26 trustees to seven. I don’t think that was bad. I thought that was a good thing. The biggest impact was a reduction in the top level administration. They had so much work to do to make this happen, all with no extra time, people, or money. Looking back at this, I don’t think this was right. We still had the same number of kids, so why didn’t we keep the same number of administrators. Not only did we reduce the number of superintendents, but we increased their work load.

Trustees Brenda and Lorna indicated that the changes not only affected the lives of those who left, but also of those who stayed. Brenda stated that, “A massive change like that is going to confuse people. Some people lost their jobs. There are fewer trustees and central office people left to do more work.” Lorna commented that:

There were trustees cut and our administration was cut, but support staff, because there are a lot of people in this building who worked partly for the municipality, and partly for the school district, most of those people went to the municipal side. This was one of the ways we were able to accommodate almost everyone. At the school level I think people were more concerned with the general educational cutbacks and their jobs. I don’t know if any tenured staff were let go at the school level, so the outcome was positive, in fact with the growth we have had in some areas and the retirements that occurred, we’ve been more fortunate than other districts.

The three principals interviewed all indicated that people lost their jobs because of the restructuring. The number of trustees was reduced and individuals who were in a central office position before the regionalization were no longer in that position or no longer with the new division. Larry saw this as part of a bigger issue. “People lost

their jobs. Lots of people lost their jobs, and it's still the great decision. Are we site-based or centrally controlled? That still has not been resolved in my mind."

The major concerns outlined by principals related to an increased work load, a greater stress factor, and the buffering of teachers and students from the impact of the merger. Larry indicated that his work load greatly increased. He reported that he, "goes to more meetings than ever before, and this takes him out of the school more than he and his staff would like." He commented that a majority of principals in the division felt the same way and he further indicated that, "several of his colleagues had left administrative positions because education is no longer about kids, but solely about money." His perception of the system is that it has become more bureaucratic. Discussions at meetings seem to always centre around money. He said, "since the move to restructure, administrative meetings are rarely related to programs and what is best for kids. Budgets and cost reduction appear to be the only issues."

As a principal, Larry reported that he was deeply concerned about buffering and protecting his students, teachers, programs, and school from the bureaucratic cutbacks that were occurring. He further explained that, "as spending decreased, there has been a need to become more creative in the way quality education is maintained for students." Larry also indicated that because of all the changes:

The stress level for teachers and principals is also growing higher than it's ever been. I don't know at what point it's going to break. It's a matter of time, and people will start to snap. There's a tremendous amount of fear about speaking out right now. People are scared of what is happening to education. They have no input. We're living in interesting times.

Glen, the principal from Pearl City, was also critical of the impact that this merger has had on people. He expressed concern that any savings realized because of consolidation have not been transferred to schools. He further stated that he perceived, "the amalgamation costs far outweighed any benefit to people and schools." He commented that in smaller organizations, "If you give people reasonable jobs, with reasonable expectations, they will work harder for the system." He added that, "if you

create large bureaucratic systems people are not as loyal to the organization” and become, “specialized and job focused instead of child focused.” In Glen’s opinion, “people give all they can if they feel they are a valuable part of a team that is accomplishing things.”

Glen also indicated that the restructuring period was a very difficult time for him. He stated that structures that were successful had been stripped away and the way things were done, changed. Effecting change to improve things was quite acceptable to Glen but, in his opinion, the changes associated with this amalgamation made no sense at all. He reported that many of the resources that he, as a principal, and the schools depended on, were eliminated. People who were in positions of support and mentorship changed, or had their positions eliminated. Glen expressed his disappointment in these words:

There’s no support system anywhere, and the feeling of isolation is immense. I think from day one, this was a negative experience for most people involved in regionalization. There is absolutely no question that our kids and our parents are less well served now than they were before. Personally, that’s the ultimate sin in amalgamation. I’ll be really surprised if you’d find anyone who would say that children are better served under our new system.

The teachers interviewed did not appear as stressed or concerned as the principals about how consolidation had affected personnel in the district. They reported that the average teacher did not perceive much of an impact on system personnel. Mike indicated that most teachers hadn’t realized that the amalgamation had occurred because it appeared as if everyone still had their jobs. He expressed disappointment that the, “administrative dollars that were going to be saved through restructuring, and then reallocated to classrooms, were not appearing.” He contended that part of the problem teachers faced, “was that there were too many changes occurring at the same time. Amalgamation, site-based management, and funding cuts were all imposed at the same time.” He elaborated:

Cut backs, regionalization, and site-based decision making all hit us at the same time. But I’ve seen bigger class loads, so therefore we must have fewer teachers because we haven’t got that many more kids in our schools. So I

assume we lost some teachers. But for the average classroom teacher, I can't see much of a difference.

Sam, a teacher from Pearl City, had some similar perceptions but reported that, "regionalization was more of a takeover process than a merger where the county employees benefited the most." He contended that, "the central office personnel looked after their own, and were not really affected very much by the changes that took place." He commented:

One of the superintendents got a really sweet deal with another employer, and is probably making more than he ever would have made here. We also lost one of our assistant superintendents. When it come to secretaries, I think there was one that took some type of early retirement, but I'm not aware of any secretary that lost their job. One of the secretary treasurers negotiated a buy-out. So it looked like a few of our side took some hits, but it didn't look like anyone from the county took much of a hit.

Sam also indicated that he didn't think any teachers lost their jobs or were affected negatively because of the consolidation. Reiterating Ted's view, Sam observed that the teacher issue was treated with kid gloves, and that the schools and teachers were spared any severe impact resulting from the merger. Like many others, he reported that the trustees and central office took the major share of the cuts.

Andy's view was that a number of different people were affected by the merger. He reported that the number of trustees was reduced. These elected officials lost their jobs before the end of their term. Before the merger, all three jurisdictions had superintendents and some had assistant superintendents. The new system now had only three central office administrators and fewer support staff. He also indicated that the amalgamation did not have an impact on him personally. What he perceived as having the greatest impact on him, "have been the budget cuts." He explained:

I think all the way along there has been job loss, right from the trustees, down to some central office personnel. From what I recall, there were also some secretarial staff who were bumped. At the school level, what's affecting me now, is the budget. In terms of the amalgamation, it really hasn't hit me at the school.

The theme, organizational structure, encompassed five sub-themes which included: 1) central office structure, 2) system size, 3) policy, 4) culture, and 5)

personnel. Participants viewed the impact of the consolidation on these sub-themes in a variety of ways. Most respondents viewed the central office structure as being very similar to the previous County central office structure which had a direct chain of command running from the board down to the schools. Trustees and central office administrators perceived the new structure to be organizationally flatter, but school level participants saw virtually no change. Some of the teachers and principals were disappointed that the opportunity for meaningful change was lost. They saw instead a more distant and bureaucratic central office that was never seen in the schools.

Participants had mixed feelings regarding the size of the new jurisdiction. On the one hand, almost all participants expressed a sincere loss for the small, close-knit organizations that they each had been part of. On the other hand, all participants saw many positive aspects to the increase in system size. They indicated that students were able to access additional programs that were not available before the consolidation and teachers and principals now had access to numerous job related opportunities associated with the increase to jurisdiction size.

Policy development and system culture were not seen by most participants as critical factors related to organizational structure. Most participants felt a loss of culture related to the smaller, community oriented systems, but believed that a new Ebony Pines culture would soon emerge. Policy development was viewed by most respondents as an ongoing process where all stakeholders had the opportunity to provide input. Most participants indicated that the process used to develop new policy for Ebony Pines was open, participatory, and democratic.

The effect of restructuring on the personnel of these three former school jurisdictions was different for each of the participants. All respondents indicated higher levels of stress and anxiety. The number of trustees was reduced from 26 to seven. Superintendents doubled their workloads and were uncertain if they would have a job after the process was complete. One superintendent became the new superintendent,

one accepted a severance package, and the third was demoted to deputy superintendent. One secretary-treasurer and two support staff were given severance packages. Other than stress and a lack of communication during the process, school level personnel indicated that impact to them and the local school communities appeared minimal.

Efficiency and Effectiveness

One of the main reasons for the massive restructuring in the province of Alberta was the government's claim that amalgamation would provide a more effective and efficient system of education. Education Minister Jonson (Alberta Education, March 30, 1994) stated that, "We want our restructured education system to be efficient and effective and to provide access to a quality education for all Alberta students." The *Guide to Regionalization* (1994) further endorsed this position by stating:

In public discussions and consultations over the past years, Albertans told the Province that there were too many school boards. Albertans believe that reducing the number of boards would result in reduced administrative costs and increased efficiency in the education system. The number of school boards can be reduced through regionalization or amalgamation. (p. 1)

Participants in this study understood the concept of efficiency in terms of dollars saved and effectiveness as having created a system that provided better services for employees and students. The first part of the discussion on this theme deals with the issue of efficiency.

Efficiency. The trustees viewed efficiencies created through consolidation in a number of different ways. Lorna, the trustee from Pearl, indicated that she didn't perceive any savings gained by eliminating the two smaller jurisdictions. She commented that, "Bowlen and Pearl were on very tight budgets and there wasn't room to cut or save any further." But in the big picture, she did see some savings. She stated that the reduction in the number of trustees from 26 to seven, and the reduction in

the number of central office administrators and support staff, did save some dollars.

Lorna added:

Coming from one of the small jurisdictions, I know we had a very small central office. The majority of our funding went into the classrooms to directly serve students. I don't see us being any more efficient than we were before. Overall, there were some savings, but for each of the small jurisdictions, I don't know that we have been able to put more money into the classrooms because of regionalization.

Like Lorna, Sonia the trustee from Elcot, didn't see the overwhelming savings and positives that were being promoted by the government through amalgamation. She identified some savings because of the reduction in trustees and administration, but she stated that, "nothing seemed to change at the school level for students." She commented that, "the reason we are involved in education is for children, yet any cost savings that did result, did nothing to improve teaching or learning. No extra teachers or smaller class sizes resulted because of amalgamation."

Brenda, from Bowlen, agreed with Lorna and Sonia that some savings were realized through the reduction of trustees and administrators but there were also costs involved in the process. She indicated that people were quick to point out the cost savings but have forgotten about the time, effort, and money that went into making the regionalization happen. She explained:

Overall I think regionalization cost more money than it saved. We had to buy a building, renovate it, and purchase new office equipment. We had to pay severance packages to a number of employees, including a superintendent. Even the time and energy it took to implement the process has a cost that we have not worked into the formula. And in the end, there wasn't any more money for schools and kids. Efficient? I can't say it was.

Central office administrators provided some very illuminating thoughts relevant to the issues of efficiency. Greg agreed with Lorna that the smaller jurisdictions did not realize any savings because of consolidation. He indicated that the smaller districts had lower tax assessments and spent about \$1,000 less per student than the county did before the merger. Results on Provincial Achievement Tests were very good and communities were very satisfied with the education their children were receiving. The

central offices were understaffed and most of the money went to schools. The only area in which Greg reported some savings, was in the reduction of trustees. He also reiterated Brenda's perception that the regionalization cost more money than it saved.

He stated:

To be honest with you, I don't think we saved any money. There were costs involved that you don't hear about. There was the cost of implementation, the severance packages, and the re-tooling of the building. They also had to rent space for the first two years which added another cost.

Like Greg, Bill expressed concern over the actual savings and improvements generated by the amalgamation. He also reported that there were some savings but not the massive dollars that were promoted by the government. Bill further explained that any savings incurred should have been as a result of the economies of scale. Going from three superintendents, three boards, and three central offices to one of each, should have saved some money. He also indicated that the economies of scale did not necessarily effect a reduction from three to one. The County of Elcote shared a lot of its costs and services with the municipal side of the county system before the regionalization. That was no longer the case. Where the school board saved some dollars, the county or municipality now had to spend extra dollars. Tax dollars were now being spent in different areas. Like Brenda and Greg, Bill indicated that the new jurisdiction of Ebony Pines had to spend a lot of time and money to implement the amalgamation. Bill reported that these costs were in the areas of severance packages, purchase of a building and renovating it, purchasing new equipment like telephones, desks, and technology. Bill explained that these expenses outweighed any potential savings:

There may have been a couple hundred thousand saved on personnel, but we spent \$600,000 on redoing the building. Other areas that we used to share with the county that provided us some efficiencies was snow removal, building maintenance, lawn care, and contracts with support groups like CUPE. We have to look after these on our own now.

Both Henry and Nick indicated that there were some cost savings to the government through the reduction in the number of trustees, superintendents, and

district offices, but the system did not realize any additional dollars from the consolidation to put into student programs. They both stated that there were a number of advantages to merging jurisdictions, but there was also a cost factor that was borne by the new division and the savings appeared to go to the government.

Ted was a little more positive in his response. He felt that the process did save some money, but it was not a lot. Ted explained:

In terms of the organizational structure and the central office administration, I'd have to say that is where we achieved the greatest efficiency. We saved about \$600,000 a year on salaries when we regionalized by reducing the number of superintendents, assistant superintendents, directors, trustees, and central office support staff. It is more efficient to run one central office than three. We are probably a bit more efficient in terms of transportation too. But when you look at even a \$600,000 savings in a budget of \$55 million, it's really a drop in the bucket when you come down to it.

The principals did not see any overall efficiencies created because of amalgamation. They believed that there were some savings created through the reduction of trustees and central office administrators but the cost of implementation, the new office construction, severance packages, and the building of a new central office bureaucracy had eliminated any savings that may have come down to schools.

Glen was emphatic in his response stating:

It's an extremely inefficient system. We went from a system where as many dollars as there were, got to the classroom level. Now with the new bureaucracy, a lot more money is spent on administering a big inefficient system. Because the system was small, we knew each other, we could trust each other, and we could quickly and easily resolve problems. We didn't need a lot of steps in between to get things done. With the new system it takes forever to get things done and that costs money. I don't believe that is efficiency.

Jane's response indicated that:

We saved paying some trustees. But our expenditures in terms of central office have gotten bigger. I suppose they have had to create their own areas where they used to share these facilities and services with the county. Things like the phones, photocopiers, secretaries, and office space have created increases in costs. Also the operations and maintenance areas have been growing and are inefficient.

From the teachers' perspective, consolidation did not create a more efficient school system. Teachers indicated that what they have encountered is a reduction of

budgets at the school level, increased class sizes, and a larger, unseen bureaucratic empire at central office. Like principals, the teachers appeared to miss the closeness and familiarity of a smaller system.

While discussing the issue of efficiency, responses from teachers centered around school and classroom issues. Teachers were either not adequately informed or not comfortable making comments about savings or costs incurred at the central office level because of the amalgamation process. In relation to efficiencies at the school level, Sam said, "Based on the fact that the amount of money per student given to my school has gone down, I would have to say that efficiency is probably the last thing that happened for us." Mike agreed, stating:

I don't see it as a major advantage in terms of dollars in the classroom. I think that long term maybe, but not short term. There were a number of pay-outs that occurred when people left, and they didn't leave cheaply. But for the average classroom teacher I can't see much of a difference. There was little or no impact for the majority of teachers, only for those who had to deal with the bigger picture outside the classroom.

Effectiveness. The issue of effectiveness prompted a number of the participants to more closely examine whether consolidation had made things better for students and if there was an improvement in the how things were done.

The trustees presented an interesting position. Although they described amalgamation as partly a good thing, they were not convinced that the new system was any more effective. Lorna maintained that, "the smaller systems were very effective before the merger. Since the regionalization, class sizes have continued to increase, and the work load for everyone has gone up." She explained that there was a need for better planning and coordination of services to maintain the current program standards. Due to the number of other changes that were occurring at the same time as amalgamation, Lorna was not convinced that the reason education was less effective today was because of the consolidation.

Sonia also had some mixed feeling about effectiveness. She saw a definite need for the merger to occur in Ebony Pines but was not convinced that school jurisdiction mergers were the answer across Alberta. She explains:

If you look at establishing common policies and practices throughout a specific geographic area, I think that makes for a more effective operation. Transportation is more effective now, not that it couldn't have been by having a joint agreement under the three separate systems. Overall, there's absolutely no doubt that what we did in our district made absolute sense. Whether all of the amalgamations across the province made sense, I doubt it very much.

Like Lorna, Brenda didn't believe that the merger had any impact on system effectiveness. She indicated that, "These things take time. Change just doesn't happen over night. I feel very positive that, in the future, everything will work out."

Like the trustees, the superintendents were not convinced that the reorganization did anything to improve the overall effectiveness of the school system. Greg stated that:

As for being more effective, I don't think so. Personally, I think it's less effective. If you create a larger bureaucracy on the business side, it seems to me that you will need an army of people to carry out the everyday business related to education. More people means more money and more time. That isn't being more effective.

Nick agreed with Greg. He contended that, "The people I've talked to are saying that things are not getting any better. In fact, they are getting worse. If the intent was to make it much rosier, I'd have to say the government initiative hasn't achieved that." While Greg and Nick believed the organization was less effective, Bill and Henry felt that there was no significant change in effectiveness after the merger. Bill described the combination of amalgamation and site-based decision making as, "requiring a lot of democratic activity." He further commented that:

Democratic activity is very time consuming. We spend endless hours meeting, discussing, and arguing over issues. We're finding less time to spend in the schools, and trustees are having to cover more. In relation to the bottom line, are kids learning more? Are they learning better? Are they learning to write better? Are they learning their computational skills much more effectively? No Difference!

Henry indicated that, “I haven’t seen any real evidence that the delivery of programs or resources to schools and students is better because of amalgamation.”

Unlike the other superintendents, Ted outlined a number of areas that he believed were more effective as a result of consolidation. He reported that the merger of the three jurisdictions created a more effective transportation system. Students now have a greater choice of schools and programs. There were greater opportunities for staff to transfer and advance into administrative positions. Ted also stated that the new jurisdiction was now more effective in meeting the technological needs of its students and staff. In addition, he commented that, “coming from a different system, could change your interpretation of effectiveness.”

Like most of the respondents, the principals agreed that the overall operation of the system after consolidation was less effective. The loss of personal contact with central office, and a sense that everyone is not on the same team had these principals frustrated. Larry summed it up this way:

It’s not as effective. There are many good people, but the system and the situation have changed. The current way of doing business is no longer effective at this size. When you have a small system it’s easy to have a close, positive relationship with the other principals. When you triple in size, your relationship with the other principals is a lot different. What may have been viewed to be very positive in the past, in the new system can be viewed as a negative. We haven’t worked that out yet.

From the teachers’ perspective, school system effectiveness was not enhanced because of amalgamation. Teachers commented that they had lost the sense of familiarity that goes with a smaller system, and that the central office had become a faceless bureaucratic empire. The reduction of dollars at the school level resulted in staff cuts, increased class loads, and program reductions. Sam indicated that in his view, the new system was:

Not as effective. I can’t see how they could be more effective in serving the needs of the kids here. I can’t think of a single way in which they could be more effective. Bigger is definitely worse. Anything that is good for teachers is automatically good for kids. The truth is, if you’ve got well paid teachers, who are happy in their jobs, with decent work loads, good support from their administration, it is going to show up in the kids’ performance.

Andy's perception of the effectiveness issue was based on money. He reported that teachers were still frustrated about the five percent pay cut that they were forced to accept in 1996. In addition, he indicated that many of the decisions and problems that had been created through all the change had been downloaded onto the schools. His interpretation was that effectiveness and money go hand in hand. He stated that, "the new organizational structure has had some impact on effectiveness, but I think it's mostly because we have less money."

None of the participants perceived any significant change in efficiency or effectiveness as a result of the consolidation. Most indicated that the cost of implementation exceeded any perceived savings and any savings that were actually realized were accrued by the provincial government. The new larger consolidated jurisdiction was perceived by most participants as less effective in providing personal and quality services that was viewed as standard in the previous jurisdictions.

Students and Programs

Teachers interact and work with students on a daily basis. The close ties with the children under their care provides them with a clear perspective for understanding what impact the merger has had on students' lives. None of the three teachers interviewed perceived any overall benefits for students related to the amalgamation.

Mike explained that as a classroom teacher he didn't perceive any difference in student achievement. He reported that there was little or no impact on the majority of students and programs. For those people in charge of programs, like principals and department heads, they might be aware of some beneficial changes. Although not involved in special needs programming, Mike indicated that this might be an area where students could have gained some programs and greater choice.

Andy agreed with Mike stating that he did not see any benefits to students or programs resulting from the amalgamation. Most parents and students he had spoken

to, “didn’t know a lot about what was going on and didn’t see anything that had improved schooling for them.” Andy described the school situation as, “lacking valuable resources and struggling to maintain their programs.” He further stated that:

The finances that we have at the school level seem to be getting smaller. We have just gone through a process where we had to really look at keeping the programs that we have in place, rather than adding. The money seems to be so tight that we haven’t been able to expand programming for kids, and from what I hear, most of the schools are in a similar situation.

Sam agreed with Andy that the students he teaches didn’t perceive any changes either. He further commented that, “try as he might, he could not think of one positive thing that consolidation had done for students or programs.” He reported that, “reducing the number of school jurisdictions across the province had nothing to do with improving the quality of programs or student achievement.” His perception was that, “money, control, and politics were the key issues.”

The other participants in the study who interact with students on a daily basis are the principals. Like the teachers, the principals did not perceive any direct changes to program or students as a result of the merger.

Jane cited several areas of concern related to funding cutbacks and site-based decision making but could not find any relationship between consolidation, students, and programs. She stated that, “if schools were better funded then we would see better programs for all students and an increase in student achievement.”

Both Larry and Glen agreed with Jane’s point of view. Neither could find any positive connections between students, programs and mergers. As with Jane, their main concern was the funding cuts that occurred. They both indicated that as the funding decreased, the viability and effectiveness of many programs were put at risk.

Glen made the statement that, after listening to the government justify school board amalgamations in Alberta, it was his understanding, “the money saved would go to the classrooms and be used for students and programs.” He stated that, “everyone was taken in by this simple logic.” He went on to say that, “If the government had put

the savings created by amalgamation into the classrooms, there would have been a number of beneficial things occur for students and programs.” His assessment was that it didn’t happen. He reported that the money saved was taken out of education and now we were all struggling to maintain our current level of programming.

Trustees appeared to take a more positive approach to the impact that consolidation had on students and programs. Sonia’s perception was that the amalgamation process created opportunities to centralize and expand certain programs like languages, special needs, and career and technology studies. What happened, instead, was that funding cuts occurred at the same time as amalgamation, and thus shelved most of those opportunities. She continued by stating that, “although all the potential opportunities were not realized, some students in the smaller jurisdictions are now able to attend schools outside their previous boundaries to access specialized programs.” Sonia also contended that, in time, school systems would refocus their priorities on these lost opportunities when the government decided to focus again on students. She explained:

The previous minister used to tell trustees that they were spending too much time on the three B’s, (busses, buildings, and bucks) instead of the three R’s (reading, writing, and arithmetic). But now it seems that it has boiled down to the one B. Bucks.

Brenda didn’t comment as she said she wasn’t fully aware of the impact that consolidation had on students or programs. Lorna stated that if, “she could be shown that all the money that was spent on education before restructuring was still being spent on education, then she would say that was a good thing.” She didn’t believe that this was the case, and because of it, her perception was that there has been a negative impact on students and programming in Ebony Pines. Although she indicated that there had been some negative implications, she also believed that there were some positive aspects. She provided these examples:

Because of amalgamation we have been able to develop and enhance the store-front school, provide more assistance for students and parents on home schooling, implement a high level technology plan, and provide a

comprehensive monitoring program for the learning disabled. I don't think before with the smaller systems that these programs could have been implemented. So some programs have been instituted to help kids.

The central office administrators had mixed views regarding students, programs, and their connection to the merger. Greg, Bill, and Henry all indicated that because of size, the district was able to offer an expanded program choice for some students. They did however state that in terms of student learning and outcomes, consolidation had no affect. Henry pointed out that, in his opinion, "enhanced benefits for students and programming was never the intent of amalgamation." His perception was that the intent behind restructuring was:

To collect all the tax money and control the decision making. I think that was the main reason for regionalization. I'm not really sure if the whole business of student achievement and deciding what's best for students was part of the plan. It was a business decision to balance the budget, so one of the first things you do is make sure you have control of all of the finances, and that's what happened.

Nick and Ted also indicated that the merger appeared to have no effect on student achievement, given the results of the Provincial Achievement Exams; however, they both provided the same examples of positive program initiatives that were presented by Lorna. They both stated that these new high cost programs were a direct result of amalgamation. The creation of Ebony Pines Regional School Division was the only way to that they could get enough students and dollars together to justify these system programs.

Ted saw many benefits to students and programs as a result of the consolidation. He explained:

One of the positive outcomes for all three of the systems was greater student choice. The smaller districts had only a few small schools, now Ebony Pines has 25 schools. We have open boundaries with transportation for students to the big centers. Our students have new opportunities to take programs like French Immersion, vocational programs, automotives, and so on. There are more opportunities for students with special needs. There is much better co-ordination of programs like home schooling and technology. There are more alternative programs like the store-front school and cyber school. Teachers have more opportunities to transfer within the new region. We can provide better inservice programs for things like CTS and technology. By being larger

we are able to provide greater choice for students and that has to be good for for our students.

The effect of restructuring on students and programs was described by most participants as minimal. A number of participants indicated that a couple of new programs were available to a select group of students but ,the level of service and achievement for most students did not change as a result of consolidation. Trustees and central office administrators were able to describe new programs that were a direct result of being in a larger jurisdiction but, school level participants did not perceive much change for the majority of students. Participants generally indicated that restructuring was not meant to improve educational opportunities for students but, was intended to be a provincial government initiative to cut educational spending.

Personal Impact on Respondents

By the very nature of their diverse roles, respondents were affected in different ways by the amalgamation process. Some had very negative stories to share. For others, consolidation created a window of opportunity, that might not have been available had these changes not occurred. Still others did not perceive any changes to their lives because of the merger.

Sonia, as a representative of Elcot, indicated that the change to a regionalized division from the former county had not drastically changed or affected her role as a trustee. The two biggest changes she had to deal with after the merger were the increase in workload and additional meetings, and the loss of certain powers and responsibilities that previous boards had. In addition, Sonia stated that in the newly consolidated jurisdiction, her role as trustee now represented more of a district-wide focus instead of a small ward focus. She explained:

The reason I am doing this is not just for the kids in my area, but for all the students across the jurisdiction. The workload and number of meetings have definitely increased. Also our requisitioning power has been taken away. We can no longer set some of the rules. We have to play by the government's agenda.

Being a trustee from one of the smaller districts, Lorna found the amalgamation process a lot more traumatic. She indicated that, “during the merger process, the local boards became the public’s whipping post for the multitude of mandated changes imposed by the government.” Lorna took these attacks personally and stated that, “if I had to do it over again, I, and a number of my colleagues, wouldn’t have let our names stand for re-election.” Lorna expressed a sincere sense of pain. She reported that the entire board gave so much of themselves and their personal lives that, “after my involvement was complete, I couldn’t continue watching and being part of what was happening to our jurisdictions.” She elaborated:

So many people have worked so hard and given so much, that they couldn’t do it anymore. I’m one of them. I see that as a huge loss and a negative outcome. A lot of people who were good trustees decided not to run again. Change is hard to take and if you have to defend everything that you do, that’s tough. It becomes a personal attack on you instead of on the policy or process. I couldn’t handle it.

Lorna explained that most of the changes that were occurring were a result of government initiatives and directives. As trustees they had to defend and implement these changes. A number of changes, like the funding cutbacks and site-based decision making, were not even related to amalgamation. She said that, “the government had isolated the school boards across the province and told the public that the province’s educational problems were the boards’ fault.” She interpreted these events to be a personal attack on her board and on her that was based on a number of issues that weren’t even their responsibility. She summed up her response by stating that the process, “hurt me personally.”

Brenda, the third trustee interviewed, could not comment on how the process affected her personally because she was not a trustee at the time of merger.

The teacher participants each had a very different story to tell. Mike saw a positive side to consolidation, Andy presented a neutral perspective and Sam indicated that the process had a negative impact on him.

Mike reported that initially, amalgamation had no effect on him personally or professionally. Since the merger of the three jurisdictions, he has begun to realize that, “a larger pool of expertise has come together in a new school division.” He perceived this to be very positive and beneficial for the development of new programs and improved teaching strategies. Mike also indicated that during the past few years he has often considered getting into administration, but in a small school jurisdiction. He explained:

Moving into administration was very difficult to do. You either had to move, or wait until someone left. There was never any opportunity for change or advancement. Now with the larger district, there seems to be greater opportunities to transfer schools and get into an administrative role.

When Andy was asked if the merger had affected him personally in any way, he responded, “Not really. At the school level what’s affecting us now is the budget cuts. In terms of the amalgamation it hasn’t really hit me as a teacher.”

While Andy didn’t perceive any personal impact because of the consolidation, Sam’s perception was that the impact was very negative. Although Sam did not report any changes in his role as a teacher as a result of amalgamation, he stated:

The process has been an emotional disaster for me. It has been the single biggest disaster for me emotionally and mentally that I’ve ever experienced in my life. It was a big let down. There was this promotion that this whole process was going to free up more funds, become more efficient, more effective, through the coming together of districts. A real plus in terms of economy of scale. It didn’t happen. None of it came true. None of those dreams that I was counting on came true. It was a real emotional let down for me.

When the principals were asked if amalgamation had some effect on them personally, they indicated that their roles as educational leaders had expanded and become more stressful. Larry reported that one of the drawbacks was, “having to attend countless more meetings in the new jurisdiction.” He also perceived his role as principal had shifted from an educational leader to a middle manager. The biggest impact for Larry was the added stress that was placed on him as the leader of the school. During the process, he indicated that he felt like it was his responsibility to

share the news, yet at the same time buffer the school from the political bantering that was occurring.

Glen was affected in a slightly different manner. What affected his life were the changes in the previous structures that existed within the organization. Having relied on certain people to act as resources for him and the school, he was no longer able to access these individuals. Processes, policy, and procedures had also changed. Glen reported that by implementing so much change at one time, schools and principals became isolated as they, “battened down the hatches and tried to ride out the storm. When they came up to see what had happened, they were in unfamiliar territory with the weight of the whole world on their shoulders.”

Jane, like Glen, was also personally affected by the amalgamation. She indicated that before the merger she worked in the central office of one of the jurisdictions. As the merger process began, she was told that she might not have a job once all the cuts were made at the central office level. She decided to take a principalship in the district to ensure employment. She recalled that:

As it turned out, I could have stayed at my job because it ended up not being cut. Who was to know? I worked very hard to make that career advancement, and it was so easily taken away. It hurt me that after years of dedicated service they could not tell me what was going to happen. Some days I wonder if I made a wise decision by leaving so quickly.

In addition to a career change, Jane stated that she had also been affected as a principal. The endless meetings, the stress of constant change, and the politics of supporting the board and government through the amalgamation process had taken its toll physically and emotionally. She further indicated that she was, “stressed, tired, and emotionally drained. I hope that I never have to go through this process again.”

For the most part, the central office administrators who were interviewed felt that consolidation had both a positive and a negative impact on them. The positive side was a reflection of their advancing their administrative careers within the new larger jurisdiction. The negative impact of the merger took the form of an increase in stress,

in the number of meetings, and in the workload. All of the central office administrators indicated that another negative consequence of consolidation was the reduced time spent in schools associating with students, teachers, and administrators. They reported that this was a consequence of their increased responsibility and work load, that was a direct result of the increase in jurisdiction size, and corresponding reduction in the number of administrators.

Greg commented that personally it worked out well for him. In the beginning he explained that all of the meetings, the planning, the politics, and the unknowns of who would stay and who would go were very stressful. He was happy with his position as a superintendent of schools and wanted to retire in that position. It wasn't to be. Greg indicated that, "when he didn't get the superintendency, he didn't know what he was going to do." He only had a few years until he could retire on full pension, and now he was without a job. All that he had worked for seemed to disappear. He stated that jobs for superintendents were tight, because many had lost their jobs the same way he did during the amalgamation shuffle that was occurring throughout the province. In the end he decided to leave and took the severance package. He commented:

I had a good clause in my contract for a severance package. I stayed on for a while working on a special project and my current job just seemed to fall into my lap. I got a three year contract at my new job and a good severance package from the school board. So, in the end it worked out really well for me but at the time I was devastated.

Henry, the secretary-treasurer, indicated that during the amalgamation process it was like having two jobs. He had to continue the day to day operations of the existing school jurisdiction, and at the same time implement the necessary changes associated with the merger. Henry reported that one of the most difficult challenges was keeping everyone informed about what was occurring. Added work and stress came with the implementation of site-based decision making and budget cuts. It was not a happy time in education. Henry added that, while doing all of this, he didn't

know if he would have his job when the three jurisdictions merged. He stated that he, “often questioned why was he doing this if someone else was going to get his job and reap all the benefits of his hard work.” He concluded by saying, “I got the job and that was a great relief. It was a very trying time, but somehow we managed to get through it.”

The impact on Bill was very similar. He indicated that the government, trustees, teachers, and public expected the superintendents to know everything about the restructuring process. Like Henry, Bill commented that communication played an important and time consuming role. A lot of the communication occurred in meetings. He described it this way:

The board needed to have meetings. The board needed to have committee meetings. The board needed to have meetings with the communities, meetings with the government, and meetings with the staff. Central administration was expected to be prepared for those meetings, attend the meetings, and then after the meetings take action because of the meeting.

It appeared to Bill that he spent all of his time in meetings related to the merger. He explained that even though he had to deal with all of the meetings, in the mean time, the, “regular business of operating a school system needed to be done. Everyone wanted a piece of your time.” It appeared as though most people wanted to meet on a one to one basis. This took up even more time. Bill also indicated that because of the added workload, he was unable to get out to the schools. He had always considered himself a very open and personable administrator who loved to get out to the schools and see what was going on with the students and teachers. The time commitments in running a school division and implementing the consolidation did not allow for this to occur.

As with Henry and Bill, Nick felt that the issue that affected him most was the added responsibility and workload. He went from a small, comfortable jurisdiction to a large multi-faceted school system. He explained:

By nature alone that’s double the issues, double the parental complaints, double the people to deal with, which is double the work, time, and challenge. It

certainly has been a growth experience for me in terms of additional responsibilities. The role has become so large that I had to hire a full time administrative assistant. There is so much more to do that you need to put additional people with expertise in place to ensure that things get done and get done properly.

Ted agreed with the other central office administrators that the increased workload had taken its toll on the everyone's wellness. He commented:

Personally, I used to be five minutes from work. Now I'm at least 25 minutes. I know it's not significant but I used to walk, and would go home for lunch every day. Now I can't. I think from a personal point of view, to be able to go home and relax is a real bonus. You get refreshed and get ready to get at it for the afternoon. Now I usually end up working through the noon hour.

In addition to the personal time that Ted reported as lost, he outlined meetings and an increased workload as other stress factors related to consolidation. Ted said:

In the beginning there were endless meetings dealing with the how the regionalization would work. Then there was the stress of not knowing what job you would have with the new jurisdiction. We haven't calculated the cost of implementation, but it took a lot of time, energy, and resources. It was a stressful time.

By the very nature of their involvement and their jobs, respondents were affected differently by the merger process. Some had very negative stories to share. For others, consolidation created a window of opportunity, that might not have been available had these changes not occurred. Still others did not perceive any changes to their lives because of the merger.

Overall Positives and Negatives of Restructuring

During the interview process participants were asked to summarize their views related to the overall positive and negative aspects associated with the restructuring of the three school jurisdictions. Participants provided a wide range of responses indicating the various positive and negative outcomes of consolidation. The first part of this section addresses the positive aspects of amalgamation as perceived by the participants.

Positives. Trustees saw a number of positive outcomes of the amalgamation. Sonia indicated that because of the merger, “transfer and employment growth opportunities for teachers, administrators, and support staff have all been enhanced.” She also reported that students have more options available related to where they attend school, and student program choices have increased. Programs that small jurisdictions could not afford to operate have been established like the store front school, and special needs classrooms. Sonia further stated that, “the merger has created a no boundaries, no tuition situation that all communities in Ebony Pines are able to take advantage of.” She also reported that the transportation system had become more effective by minimizing routes and maximizing capacity.

Lorna agreed with Sonia that one of the best things about merging has been the opportunities provided for staff. The small jurisdictions were not able to offer the same level of mobility or career advancement because of their size. Lorna suggested that although the merger process did not substantially increase the level of efficiency in Ebony Pines, the consolidation of school jurisdictions across the province did save a lot of money, and that was a positive thing. One of the big positives realized through the restructuring process was the equalization of student funding across the province. Lorna commented that this move by the government, “finally put all students on an even playing field.”

Brenda indicated that the only positive aspect of consolidation had been the way in which the new board had pulled together and developed a real sense of team. In her view, the new board, “all seem to have the same vision. We help each other, take care of each other, and are equally concerned about the entire jurisdiction, not just with our own wards.”

The principals were a bit more negative in their responses. When asked if there were any positive aspects relevant to amalgamation, Glen emphatically stated, “None!”

Larry didn't share the same negative view as Glen. He reported that the opportunities for teachers to interact on a professional level had increased because of the new larger system. He explained:

There are more people to interact with professionally. There are more ideas, more resources, more dialogue formally and informally, and more opportunities for staff to work in different schools and environments. You now have the opportunity to get involved in special programs, and maybe even move into an administrative role. This wasn't possible in the smaller jurisdictions. I think that's a positive step.

Jane identified some of the same positive outcomes as Larry. The opportunity to meet and share ideas with a larger group of colleagues was seen by Jane as a very positive step in building a successful organization. Jane stated:

The opportunity to meet and come together as a large diverse group of administrators is very positive. We each have so much to share. People are doing wonderful things in schools and we don't always get a chance to celebrate these achievements as a group. We have to use each other as resource people and that has brought the jurisdiction together.

Although the teachers indicated that there were a number of negatives associated with the merger, they identified more positive aspects than did the principals. Mike stated that he preferred working in a larger district because of its more global approach to education. He indicated that because of the increase in jurisdiction size, there was a corresponding increase in the number of resources and ideas that could be shared. By meeting with a larger group of people that have a greater range of experiences, "there is a wider diversity of opinions and situations." Mike also explained that if this expertise is effectively used, all of the students and teachers would benefit. Like many of the other participants, Mike reported that the increase in jurisdiction size has provided staff with greater opportunities to transfer and change teaching assignments.

Like Mike, Andy felt quite positive about the opportunities that had been created because of amalgamation. He explained:

I think that being in a larger district is positive. There are more opportunities available for staff and students. Some interesting things have happened in terms of new projects and programs. I think it's got people really focused on education. It has forced you to talk about budgets, programs, and students. People are more active and informed about what is happening in education.

Unlike his fellow teachers, Sam, when asked about his perception of the positive aspects of amalgamation, stated, “As a classroom teacher, I haven’t seen any positive aspects as a result of amalgamation.”

Central office administrators were much more positive in their responses than any other group of participants. Their direct involvement and global awareness of the changes that occurred because of consolidation, provided them with a mindful appreciation of system benefits. Ted indicated:

From my stand point the biggest plus was greater student choice. Now that we have 25 schools, and open boundaries going to all the major centers, our students have the opportunity to take programs like CTS, French Immersion, vocational type programs, and automotives. There are also more opportunities for special education programs and the co-ordination of programs like home schooling and alternative programs.

In addition to greater student choice, Ted, like many other respondents, felt that the larger jurisdiction offered, “teachers and administrators more opportunities to transfer and pursue new challenges.” He also stated that consolidation had, “allowed everyone in the jurisdiction the opportunity to share ideas and program strategies. This had created a new resource for developing better schools and programs.”

Greg agreed with Ted. Greg stated that, “greater student choice and more opportunities for staff were the biggest benefits realized from the merger.”

Henry also viewed the process as a positive move. The merger of the three smaller jurisdictions, “created some economies of scale.” Not only did Henry perceive the issue of money as being important, he believed that the merger, “forced people to look at what they were supposed to be all about, students.” He expressed this viewpoint:

The regionalization process also forced us to look at a number of areas in education. Things like policy, communication, site-based decision making, budgets, programs, and transportation all needed to be reviewed. It gave everyone a chance to refocus on the importance and delivery of quality education.

Bill’s perceptions closely matched those of the other superintendents. He agreed with Henry that the resulting economies of scale was an important feature and he

also felt that student choice and teacher transferability added to the rich dynamics of the new system.

Negatives. A majority of participants indicated that the restructuring process created more negative situations and results than positive ones. Sonia, a long time trustee, indicated that, “cost, work load, political baggage, and unachievable expectations were the big negatives associated with regionalization.” She explained that the government had misled them by stating that there were going to be substantial savings from amalgamation and that these savings would be re-directed to the classrooms. This did not occur. In fact, she commented that just the opposite had occurred. She explained:

Schools and classrooms were supposed to be the big winners but we’re not seeing it. In fact, class sizes are getting bigger and we have cut teachers. Any money saved did not come back to the jurisdictions. The time and cost of implementing the regionalization was tremendous. We didn’t get any additional dollars or assistance from the government to offset these costs.

Sonia further indicated that the merger process required an awful lot of work in a very short amount of time. Her perception was that because of the government demands placed on the boards, “we didn’t do as good a job as we could have, but we didn’t have time for public input. That was a big negative.” An additional negative described by Sonia was the, “political baggage people brought with them.” She stated that, “trying to merge with a board that had just separated a decade earlier was no easy task. People still harbored feelings of resentment and mistrust.”

Lorna interpreted the biggest negative as being the loss of some exceptional people. She stated:

I have seen a lot of really good administrators work really hard and give so much that they can’t do it anymore. I see this as a huge loss and a negative outcome. It has become a thankless job. There was no appreciation by the government. We did what the government wanted, not what we wanted to see in place. Yet we took all of the political and personal flack. I see it in trustees too. Many of my colleagues were attacked personally. They didn’t run for re-election.

Brenda agreed with both Sonia and Lorna. Like Sonia, Brenda felt misled by the government. She indicated that, "There is not as much money as there used to be. Consolidation was supposed to save money. I think it saved the government money but it hasn't saved the schools or jurisdictions any." She also feared that the process created principals who have become too "lean and mean." She explained:

The new style principal deals more with management issues and budgets than with teachers, students, and programs. In the classroom, I find it very frustrating because the number of students are increasing and we're laying off teachers. It scares me because we're creating a dog-eat-dog world in the schools. I think principals are losing their focus and yet they don't want to. It frustrates them. We've lost four good principals in our jurisdiction for that reason. It's all money, money, money, and I don't think that's right. We are supposed to be concerned with children.

Brenda also indicated that local trustees have lost a lot of power. She said that the government, "doesn't listen to school boards anymore." She questioned the fact that, "if they don't listen to us, why do we even have trustees?" She indicated that she would much prefer to work with the government for the betterment of education.

The principals generally agreed that stress related issues were the most negative outcome of the merger process. Larry agreed with Brenda that the principals' roles have changed from being educational leaders to budget managers. This has caused Larry a lot of stress and anguish. He indicated very forcefully that, "the previous small jurisdictions were effective and efficient organizations and the dissolution of these excellent systems was a real loss." Larry also commented that working in a big bureaucracy has caused a number of negatives. He reported:

It's taking a long time for Ebony Pines to emerge with a unique culture and identity. With the current bureaucracy that has been established, it takes longer to get things done. There are more meetings and more work that is more related more to money than to kids and teaching. People have been very stressed with the process.

Jane agreed with Larry that the stress of working in a large bureaucratic system is much greater than working in a smaller compact jurisdiction. Jane preferred the small family atmosphere that they she had worked in before the consolidation.

Mike reported that the extra time, resources, and money put into the merger process did not result in any benefits for schools or students. He indicated that, “a lot of time was wasted deliberating on issues when the government had already decided the end result.”

The teachers interviewed all indicated that the most negative aspect of amalgamation was the move away from small, effective, and efficient jurisdictions to large bureaucratic organizations. Sam described the changes in the following way:

Before consolidation, this was the biggest school in the district and we had some clout. When we had some special needs or requests they were usually met. After amalgamation, we're just one more fish in the sea and it seems like we don't get the same devoted attention from the board or central office that we used to. Another negative is that the culture of positiveness and co-operation has taken about a 90 degree nose-dive since amalgamation. Nothing has been done to make it feel like it was a joining of equals.

The superintendents agreed with the teachers that losing their sense of closeness in the small jurisdictions was one of the major negatives. Ted stated that in their small system they:

. . . had close interpersonal relationships, knew each other, and called everyone by their first name whether it was staff, caretakers, or administrators. Central office administrators dropped into the schools on a regular basis and participated in all of the school events like hockey pools, golf tournaments and staff functions. Those things don't occur anymore. I think those personal type situations are the things that were the biggest loss.

Greg agreed. He indicated that, “no one appeared to be asking for this type of change, yet the government went ahead and implemented massive restructuring.” The need to become larger confused Greg. He commented:

The public wasn't crying for a change. We were a very efficient, successful and close knit district that was forced to merge. I don't think that students are doing any better. I don't think that schools have any more resources or finances. In fact, I think we lost staff and spent most of the savings that were realized through personnel reductions on the new office, equipment and implementation process.

Greg also agreed with Sonia that dealing with past feelings about board relationships did not make this merger easy to implement. He stated that:

There was a lot of resentment from the smaller districts because they perceived this as a take-over. It was perceived as a take-over that wasn't necessary

because we were all extremely effective and efficient. The past relationship between Pearl and Elcot did not help.

Henry felt that the biggest issue was dealing with so much change all at the same time. He indicated that amalgamation created a lot of additional work. The extra work and the short time line did not allow for the best results. He explained:

For the first while we had to administer three policies, three collective agreements, renovate the new office, establish a new district, elect new trustees, define new wards, and look after all of the day to day operations of three separate school districts. On top of that you had to communicate with people and deal with the anxiety. There were lots of meetings and work that was a direct result of those meetings. Dealing with so much change so quickly without a real plan was the biggest problem.

Bill was the most positive in his response. He indicated that there were some communication and political issues between two of the jurisdictions early in the process, but the trustees were able to deal with it. The only negative issue that Bill identified was that a number of excellent people lost their jobs. He felt that this was the most devastating thing about consolidation.

Although the restructuring process was viewed by respondents in a variety of ways, most participants were able to express both positive and negative outcomes associated with the merger. Generally, the most positive aspect of consolidation related to student and personnel opportunities. Students were provided with a greater variety of programs and staff were provided with enhanced opportunities for transfer and promotion. The negative outcomes associated with the consolidation were listed as greater stress, increased workload, loss of jobs, no additional money for students, loss of the small community culture, and lack of change to student achievement.

Review

The individuals selected to participate in this study were purposefully selected from four different types of positions within the three original school jurisdictions. As they told their stories, the circumstances which had an impact on their decision making and their perceptions of the restructuring process began to emerge.

While each story was unique, each group of trustees, central office administrators, principals, and teachers had some common perceptions relative to the amalgamation process. Every individual provided important personal perceptions based on their degree of involvement in the process. The depth and clarity of the descriptions appeared to increase with those individuals who were directly involved in the merger process.

Participants expressed differing levels of understanding of the process as it related to them personally and professionally. They willingly provided the researcher with their perceptions relative to the consolidation. Often responses were strongly worded and many different personal feelings were exposed. Respondents felt at ease during the interviews and seemed to want their stories to be heard.

Within each of the six identified themes, many different perceptions were presented. Participants provided responses relative to their positions within the organization and this created a diverse chronicle of responses. Each of the themes provided both positive and negative responses, though many common perceptions became evident as the stories unfolded.

Every participant's story was complex and multi-faceted, and therefore each narrative needs to be valued and shared as a whole because the whole is so much more powerful than the parts that compose it.

The following chapter outlines and discusses the major issue areas that emerged from the study.

CHAPTER 6

Major Issue Areas

Whenever we think about social change, the question of means and ends arises. The man of action views the issue of means and ends in pragmatic and strategic terms. He has no other problem. He thinks only of his actual resources and the possibilities of various choices of action. He asks of ends only whether they are achievable and worth the cost; of means, only whether they will work. To say that corrupt means will corrupt the ends is to believe in the immaculate conception of ends and principles. The real arena is corrupt and bloody. Life is a corrupting process from the time a child learns to play his mother off against his father in the politics of when to go to bed. The real and only question is, and always has been, 'Does this particular end justify this particular means?' (Alinsky, 1971, p. 24)

Introduction

To varying degrees, restructuring affected the lives of all fourteen participants of this study. As the respondents related their stories and the situations that led them to their present convictions, the entangled and multidimensional aspects of their involvement in the regionalization process soon became apparent. Often the most simple questions asked elicited complex responses. Most respondents had an opinion and a response to each of the questions. Unfortunately, when the stories were transcribed, they no longer conveyed the same sense of frustration, emotion, or joy as did the intonations, facial expressions, and hand gestures that were perceived during the interviews.

While each story was unique, the participants shared a common struggle for survival during a most difficult time of change. Analysis of the data revealed several key factors that were identified by the participants. Depending on position, respondents displayed varying levels of understanding and clarity relevant to each of the questions asked.

The purpose of this chapter is to present the major issues that emerged from analysis of the findings, which were: 1) the need for restructuring, 2) the restructuring

process, 3) system size, 4) impact on personnel, 5) efficiency and effectiveness, and 6) the educational bottom line related to students and programs.

Although the level of involvement and participation differed among participants, all individuals expressed a clear understanding of their needs and perceptions, and of the impact that the amalgamation had on them. All respondents expressed the position that they should have some input into and ownership in the decisions and processes that affected their lives. This they claimed was not always the case. The lack of consistent and accurate information was perceived by most participants as having isolated individuals and jurisdictions and brought forward many questions relating to the need for the reorganization.

The Need for Restructuring

At the time of the interviews, the consolidation process was nearly complete. Legal and procedural requirements as directed by the Alberta Department of Education were well in place, leaving only a few internal operational issues left to resolve. This allowed the participants an opportunity to reflect back and comment on the process.

All of the participants had questions relating to the need for this merger. Most participants felt that the government did not provide adequate or valid justification and rationale for the restructuring of their jurisdictions. They also perceived that the government did not openly and honestly consult with educational stakeholders before embarking on the process of reducing the number of school jurisdictions across the province. Participants stated that no definitive restructuring plan was in place. Changes were viewed as occurring in a random, "let's just get it done quickly," way. All the participants reported that their jurisdictions were very effective and efficient and that they were being wrongfully dissolved because of the lack of efficiency in other boards across the province.

In January of 1994, when the minister first announced his major restructuring plan for education, questions relating to purpose and need arose. All of the participants in the study questioned the reasons for amalgamating school jurisdictions, like their own, that were fiscally accountable and educationally responsible. Minister Jonson (Alberta Education, February 18, 1994) stated that the government's goal was to, "provide quality education to all Alberta students" (p. 1). Participants expressed strongly the opinion that their jurisdictions were providing excellent educational services to their students. They reported that their achievement test results were consistently above the provincial standard and parental and student satisfaction in schools was high. The minister explained that in achieving this goal, there was, "the need to reduce our administrative overhead," and that "the objective was to create larger, more efficient jurisdictions, which maintain and improve educational opportunities for students." He further indicated that the reduction of school boards, "from 141 to about 60" through "amalgamation and regionalization" was "expected to be completed by early in 1995" (p. 2). All of the participants indicated that their jurisdictions were already very efficient and were operating with minimal administrative personnel and costs. The systems were perceived by the participants to be very open and responsive to their communities. Local decision making, which was also one of the government's objectives, they claimed was already firmly in place. The education systems in Bowlen, Elcot, and Pearl were operating in a highly effective and efficient manner and, according to the participants, did not need to be changed. Participants contended that they had to endure these unnecessary changes because of a few school jurisdictions across the province that were not meeting government academic standards or public expectations. Some of the trustees hinted that school boards were cut not just to save dollars but that there was also a hidden agenda, to silence the grass roots politicians who were becoming a thorn in the government's plan of disenfranchising

trustees and de-governmentalizing education. This matches Robertson's and Barlow's (1995) view. They explain:

Government rhetoric notwithstanding, the bulk of these reforms were neither pedagogical nor fiscal, but ideological and political, consistent with ultra-conservative beliefs about the role of government, the role of the private sector and a deregulated marketplace. As with the rest of the Klein agenda, deficit-mongering enabled the government to couch its extremism in the language of fiscal responsibility. (p. 196)

The *Edmonton Journal* (February 11, 1994) provides a similar view:

There is a blind assumption, untested by fact or reality, that government can do nothing well. Everything that was once in public hands, maintained as a public trust for the public interest, must be turned over to private hands . . . much of what the government proposes has nothing to do with finances and everything to do with ideology. (p. A7)

The need for change through regionalization appeared cloaked in government propaganda related to cutting "fat-cat administration" instead of initiating change that would benefit students and the education system of the province.

The consolidation of services among the three jurisdictions was another suggested reason for merger. Many of the participants stated that cooperation and sharing were already in place. All three jurisdictions were already sharing services with other levels of government. Elcot was in a county system that was established in the 1950s specifically for the purpose of reducing the duplication of government services. Pearl shared many of its facilities and services with the city, as did Bowlen with the town in which it was located in. A majority of the participants contended that the exclusivity of services that was being created by departmentalizing differing arms of the government was a step in the wrong direction. Instead, the creation of a children's services department that included a variety of government agencies could have potentially saved more money and established enhanced services for children. The opportunity for school jurisdictions to establish partnerships with any number of business or government departments was also lost. Many respondents reported that a golden opportunity for meaningful change was forfeited because need, direction, communication, and creativity were not clearly established before the consolidation

process began. There was a general consensus among participants that the changes created more internal resentment than team cohesiveness. To the writer, the respondents perceptions of what was happening could be likened to circling the wagons and pointing the artillery inward.

Being educators, participants questioned whether the reduction in school jurisdictions would improve student learning and academic excellence for children. They could see very little improvement for students and classrooms other than the offering of a few centralized programs that were not in place before the merger. When asked if the reorganization benefited students, the answer generally was no.

Was there a justifiable need for these three jurisdictions to merge? Not according to the majority of participants in this study.

The Restructuring Process

Lisac (1995) described the early stages of conservative reform in the province by stating:

The remaking of Alberta appeared to rest on certain principles. It was getting difficult to sort out principles from clichés - living within our means; balancing the budget to avoid hitting the wall; deregulation; realizing that we have a spending problem rather than a revenue problem; reforming public life by streamlining government and trimming administration; competitive taxation; getting government out of the business of business; cutting out layers of fat. These were the catch phrases and ideals. (p. 180)

The catch phrases and ideas presented did not give rise to a definite plan or process for the restructuring of education. The speed and magnitude of the changes caused considerable confusion among educators, as evident from the statements of the respondents who explained that they often found it difficult to understand the need, direction, and process that was to occur. Through it all, the government continued to promise to consult and work with Albertans as illustrated below.

On February 24, 1994 Education Minister Jonson (Alberta Education) outlined that, "In the coming weeks and months I will be continuing the process of consultation

with Albertans on how best to implement the major restructuring of the education system” (p. 2).

Participants claimed they did not feel that they were truly consulted in the process. A number of round table discussions occurred around the province but participants’ perceptions were that these discussions were simply a facade. They reported that the government had a pre-set agenda and was steamrolling changes despite input and discussions that had taken place. Any attempt not to participate in the consolidation process was seen as futile, and trustees and superintendents said that it would be better to actively play some part in the amalgamation instead of the government dictating all of the process.

Kachur (1999) outlined a similar sense of government rhetoric and lack of process planning:

The government, speaking a language of public concern for education and democracy, implemented the corporate agenda, appeased the school reform movement, created a new ‘common sense’ about economics, technology, and education, and captured the imagination of ‘ordinary Albertans.’ What emerged in the process was a unique strategy on the political economic realities of Alberta and a synthesis of ideas related to neo-liberalism, strategic planning, public consultation, and the imperatives of political survival. In the name of democracy, Alberta got something other than democracy: a top down, neo-liberal approach to science and technology, labour markets, and public education that reinforced - rather than challenged - traditional patterns of resource-based development. (p. 62)

In April of 1994, the government issued its *Guide to Regionalization* that was supposed to provide jurisdictions with the blueprint for restructuring. The trustees and superintendents in the study explained that they viewed it as a document that often created more questions than answers. In an effort to clarify some of the concerns, on April 26, 1994, all three boards and their respective administrative teams met with the MLA Task force to clarify issues relating to the merger. Trustees and superintendents were given what respondents said was a top down directive that they should begin the formal process of consolidating. They were also informed that, “There will be no

transitional funding or differential grant rates paid to regional divisions. The only incentive will be local savings” (Alberta Education, April 21, 1994, p. 3).

The concept of local savings was loosely translated by the trustees and superintendents interviewed to mean that any dollars saved by reducing the number of trustees and central office personnel could be used by the newly merged school jurisdiction at the school and classroom level. School level participants shared the same interpretation of the cut backs: less administration would result in more dollars for students at the classroom level. This the respondents reported did not occur. Any money saved remained at the government level. Peters (1999, p. 86) indicated that the government claimed a savings of approximately \$13 million by consolidating school boards and reducing administrative expenditures. In addition to the dollars lost at the administrative level, the per student allocation to school jurisdictions was reduced from \$5,998 in 1993-94 to \$5,826 in 1995-96 (Neu, 1999, p. 80). This constituted nearly a three percent reduction in student funding.

During the early stages of the process, participants at the school level claimed that they were not party to any information or communication. They, like the trustees and superintendents, contended that regionalization was a government edict directed at reducing the administrative layer in education. Their expectation that the minister was going to consult with them, the active stakeholders, did not materialize. They said that there was no communication down from the minister to the boards, the schools, the teachers and ultimately the public. The entire restructuring plan was perceived by the respondents as a top down directive that had no pre-developed plan.

Participants indicated that they had, in the beginning, assumed that the government was acting in a responsible, fully open, and publicly accountable fashion. Once the process began, they said that they realized that this was not the case. They reported feeling that the government did not have a clear plan of action for implementing all of the changes that were occurring in education. Participants

expressed a belief that the main goal was to cut educational spending and it didn't matter how it was done or who got hurt in the process. Thus, by not having a definite plan, the government could not, or did not, in their view want to communicate with the various levels of stakeholders.

This perceived lack of communication and direction created a number of personnel issues. Trustees and superintendents reported feeling stressed and uncertain about their jobs. All trustees stated that they should have been able to complete their term of office before a new board was established. Central office personnel indicated they would have liked to have a year's notice to plan, prepare, and seek other job opportunities. School personnel revealed they were stressed at the prospect of having a new board and central office that had no corporate history of how things operated in the old jurisdictions.

All participants commented that the amalgamation process took a lot of time, effort, and cost to accomplish. Superintendents and trustees reported that they had to continue operating the existing systems while, at the same time, developing a new consolidated jurisdiction. Superintendents indicated that dozens of meetings were held with a variety of stakeholders in an effort to democratize the process. They reported that the difficulty of the task was increased because there was no plan or formalized procedure in place for the establishment of a new jurisdiction. Trustees and superintendents contended that the politics of trying to please all three merging bodies created a lot of tension and stress.

Ted, the new superintendent, stated that once the decision of who to merge with was formalized, the first order of business for the three boards was to establish a transition team comprised of trustees and superintendents. He further indicated that the transition team was responsible for developing guidelines and procedure on how the merger process would proceed. Trustees and superintendents all reported that they were faced with many difficult decisions. Some of the decisions that had to be made

were: choosing a name for the new jurisdiction; deciding on where the new central office would be located; and selecting a superintendent, secretary treasurer, assistant superintendents, and central office staff.

The decision to locate the jurisdiction's central office in the previous County of Elcot central office building was not viewed an easy decision by any of the trustees or superintendents. Many alternative locations were assessed. They stressed that the current site was chosen because of its central location, ease of accessibility, and appropriateness of space. Some renovations to the existing building needed to be undertaken, and the building had to be purchased from the County of Elcot.

Choosing the new superintendent was considered by most of the participants as a key political move in uniting the three jurisdictions. Two of the superintendents indicated that given the number of trustees on the transition team from each of the jurisdictions, the amalgamation process looked more like a takeover by Elcot than a merger of three separate school boards. They contended that this political bias was strategically changed when a motion was put forward that indicated that the successful candidate for the position of superintendent would have to attain five of the seven votes. This eliminated the simple majority concept by which Elcot would have been able to select their own superintendent. Elcot had four votes, Pearl had two votes, and Bowlen had one vote. The successful candidate was the superintendent from Bowlen. This established a feeling among participants that the merger was not simply a take over by Elcot, the largest jurisdiction.

While these changes were occurring, principals and teachers were not actively involved in the process. Trustees and superintendents were the dominant players in making the consolidation a reality. Principals claimed that their concerns were not adequately addressed and that the process was a foregone conclusion. Principals also contended that they lost some of their power and resources by going from a smaller to a larger jurisdiction.

Participants strongly expressed the view that if the government would have taken the time to consult, communicate, and develop a plan of action before moving ahead with the restructuring process these process problems would not have occurred.

A couple of trustees, two superintendents, and one principal voiced the opinion that the province missed a golden opportunity to make some significant changes to the way education and children's services were delivered in Alberta. They contended that if the restructuring plan had included the coordination of services for children among health, social services, justice, and education, a new unified education system would have been created. These participants also perceived that by working more closely with or merging municipal service areas like transportation, public works, maintenance, finance, and human resources, additional savings and benefits to children would have been the result.

The view that participants had relative to the process is supported by Bolman and Deal's (1991) four principles related to successful structural change.

1. Develop a new conception of the organization's goals and strategies.
2. Study the existing structure to understand how it works.
3. Design a new structure in light of changes in goals, technology, and environment.
4. Experiment with the new structure and rework failing components. (p. 98)

Without a well thought out plan that involved the educational stakeholders throughout the province, participants contend that the process was flawed.

System Size

The consolidation of Bowlen, Pearl City, and the County of Elcot increased both the number of students served and to some degree the geographic area of the new jurisdiction. The new division maintained the same boundaries as the preceding Elcot

County but increased in area by adding the internal communities of Pearl and Bowlen. Ebony Pines was now home to about 8,500 students that are housed in 24 schools.

A number of the participants indicated that they perceived the optimum student enrollment for a geographical area such as Ebony Pines to be between 10,000 and 12,000 students. At the time of consolidation, the new superintendent indicated that a number of the schools were under utilized and any additional students would maximize school and jurisdiction utilization rates and bring in extra per pupil revenue. He contended that this increase in the number of students would require no additional schools or upgrades to existing facilities. If new students registered throughout the jurisdiction they would easily fit into the existing classrooms. The additional student numbers would also provide some of the smaller communities with much needed growth. Most respondents reported that the larger jurisdiction size also allowed for the jurisdiction to provide additional specialized services for students, like special needs programs, a cyber school, and a store front school that the smaller jurisdictions could not afford.

Where central office was located was also mentioned by most participants as an important issue for the new larger jurisdiction. With the central office located approximately in the geographic centre of the 110 km by 40 km jurisdiction, the longest anyone would have to travel to get to central office would be about 45 minutes. Central office administrators commented that this enabled central office administrators, trustees, maintenance personnel, and transportation staff to get to schools on short notice when required. The superintendent reported that this size of jurisdiction provides teachers and school administrators the opportunity to have meetings and professional development activities on a regular basis.

Another plus participants saw within the larger system was the opportunity to meet the greater diversity of student needs. Trustees and superintendents explained that there were more schools housing more different programs following the merger. They

indicated that in the new, larger jurisdiction, students have been provided with the opportunity to enroll in more programs without being forced to pay for cross boundary transportation costs and out of district tuition fees. They further stated that because of the increase in student numbers, more programs have been developed and centralized to provide services that were not available in the smaller jurisdictions. This has provided greater educational opportunities for children. The central office administrators stated that because of the larger jurisdiction, schools were now able to provide a greater variety of new focus programs and students had increased opportunity to go to a school that focused on a particular program field, like science and technology.

Most respondents indicated that the increase in the number and types of schools provided teachers and administrators with greater opportunity for career changes. The larger jurisdiction has typically meant more central office administrators and more schools. Principals, teachers and superintendents reported that this has provided practicing administrators and potential administrators greater opportunity to change roles and make the transition into administrative positions. Teachers also indicated a wider range of program options available to them should they may want to pursue them. They said the opportunity to transfer schools or move into a central office facilitative position has also been enhanced.

Although participants generally reported that the increase in size had a positive effect, trustees claimed that the increase in jurisdiction size, compounded with the reduction in the number trustees reduced the personal contact that they were having with their constituents. Prior to the merger they came from smaller jurisdictions where trustees represented small localized regions, whereas following the restructuring they represented large wards. They contended that their roles had also changed from being representatives of small local wards to representing the entire jurisdiction. This reduced contact with the constituents who elected them which did not now allow for the free sharing of ideas and a full understanding of the communities' needs and opinions.

In addition, superintendents, central office personnel, principals, and teachers all indicated that the number of superintendent visits to schools had dramatically decreased. With the increase in size came an increase in workload. This combination they said did not allow for central office administrators to get out to the schools as often as they would have liked. In the smaller jurisdictions the superintendents all indicated that they regularly visited schools and classrooms. They said they knew almost all of the staff and the programs that operated at each of the schools. They took the opportunity to be part of school celebrations and even attended staff social events. Participants indicated that this provided for a sense of family to develop within the jurisdiction. Their perceptions were that this has not occurred in the new jurisdiction.

Some school level participants indicated that the increase in size had reduced the amount of communication that occurred between schools and teachers. They reported that in the three smaller jurisdictions teachers all knew each other and what they were doing in their programs. School level respondents reported that teachers regularly met to discuss program alignment and curriculum concerns. Principals and superintendents claimed that social events and celebrations were attended by most staff members in support of their own school and central office personnel also attended most school functions. They stated that these things had not occurred in the new jurisdiction. Teachers commented that formerly ATA meetings were well attended and fun-filled events. They had now taken on a business-type atmosphere.

Impact On Personnel

Each of the participants reported being affected differently by the consolidation process. Participants further indicated that, depending on the nature of their positions and the level of involvement in the process, personal impact ranged from very negative to extremely positive.

At the beginning of the merger process all participants recalled having been stressed and concerned about what was going to happen. Most participants indicated that the regionalization process took a lot of time, effort, and resources to facilitate. Trustees and superintendents reported that merging the three jurisdictions doubled their workload. They explained that they were required to develop a new consolidated system while maintaining the operation of the existing jurisdictions. Dozens of meetings were held with a variety of stakeholders in an effort to democratize the process. They reported that the difficulty of the task was increased because there was no plan or formalized procedure in place for the establishment of a new jurisdiction. The trustees further pointed out that the politics of trying to please all three merging bodies created a lot of tension and stress. At the school level, principals claimed they found themselves playing the role of buffer in an attempt to ensure that students and teachers were not affected by the consolidation process.

Principals and superintendents both indicated that the impact of the consolidation was compounded by the simultaneous implementation of a site-based management system. They stressed the point that site-based management changed the role of both central office personnel and principals. Central office staff were viewed by themselves and by school principals more as facilitators and resource personnel than as administrative decision makers. Principals reported that site-based management in education had moved a majority of the decision making process to where decisions have the most relevance and impact. Principals became the key decision makers for schools and students.

The development of new policy also had a significant impact on personnel. Trustees and superintendents indicated that an enormous amount of work had to be accomplished in a short time frame. All levels of employees were involved in this process. Most participants claimed that a lot of time, energy, and money went into the development of a new policy handbook for Ebony Pines. The superintendents

described the creation of new policies as another one of the many tasks that needed to be completed as a result of consolidation. Participants reported doing multiple tasks during this time. Some stated they were very pleased with the process of policy development but others indicated that a better job could have been done if there had been more time to meet and discuss some of the issues. A few claimed they did not see policy development as a problem. These individuals explained that policies are dynamic in nature and could be reviewed and changed whenever it was deemed appropriate.

All participants stated that the most visible impact of the merger on people in the new jurisdiction was the termination of some positions. They reported that a number of people lost their jobs as a result of the reorganization. There was a decrease in the number of trustees, and a former superintendent, a secretary treasurer, and a couple of central office support personnel left the new division. The majority of respondents indicated that the number of trustees was reduced from 26 in the three former jurisdictions, to seven in the new jurisdiction of Ebony Pines. The total number of central office administrators declined by two, from ten to eight. Also, two support positions at the central office level were eliminated. The superintendent who did not remain in the new jurisdiction contended that some of these individuals had spent a lifetime aspiring to these positions. He stated that they lost their positions not because of incompetence, but because of a government move to downsize and save money. Superintendents reported that some savings were realized from the reduction in personnel but most participants indicated that conversely the workload had dramatically increased resulting in the need to add additional staff. The individuals who were let go, reported to one of the superintendents their feelings, at the time, that their careers were over. Both the superintendent and secretary treasurer who lost their jobs, indicated to one of the superintendents that they were approaching retirement and the prospect of

finding new employment looked grim. They went through much personal pain and agony.

Trustees and superintendents both indicated that the personal, professional, and emotional stress related to the restructuring was intense. The extra work load, combined with not knowing whether they would lose their jobs, caused a lot of anxiety. The three trustees claimed that the restructuring process was a government initiative, but they were left doing the work and taking the political “fallout.” One of the trustees said that they did not want to regionalize, yet the directive from the Minister was that they had to. Two of the trustees reported that many of their associates who were not chosen for the transition team indicated a sense of betrayal by the system and dropped out of the political arena. These individuals informed the participant trustees that because they were elected officials the transition should have occurred at the end of their three year term.

Most participants claimed that trustees were affected most by the restructuring process. More trustee positions were eliminated than any other position. Two of the trustees interviewed indicated that as a result of restructuring, school boards had seen a substantial reduction in power and authority. They further indicated that their roles changed somewhat now that they represented a larger group of constituents. They claimed that they had tried to provide the best possible service to both the government and their jurisdiction and that they were politically attacked because of it. These two trustees contended that the government made most of the decisions related to consolidation and the boards had to support and implement the changes. This meant defending the government’s position, even if they did not agree with it. Both trustees indicated that they took most of the political “fallout” over the consolidation of school jurisdictions, and the government took most of the credit by telling the public that they had cut millions of dollars of the administrative costs from education. These trustees indicated that the lack of government support resulted in a number of bitter trustees.

They further reported that that many of their fellow trustees were deeply hurt by the experience and some good people quit because of it.

Superintendents claimed that they also felt stressed and overworked. They indicated that their workload doubled. They also reported that they had to maintain the old systems while planning for and creating a new jurisdiction. Their job roles also changed. Most expressed disappointment that they were demoted from their previous positions. One superintendent and one secretary treasurer took severance packages and left the system. The superintendents all reported that the stress of constant public pressure and the personal lack of job security at the beginning of the process created a difficult working environment.

The new superintendent reported that the central office support staff from all three original jurisdictions were treated with the highest level of professionalism and dignity. A plan was established where all of the new central office support positions were renamed and reclassified. He indicated that employees from the three former jurisdictions were made aware of the new positions and they were able to apply for their first and second choice of jobs. All but two employees got either their first or second choice of positions. The remaining two employees took severance packages and left the jurisdiction. All of the superintendents described the process as very stressful for staff, but indicated that the process was fair and was able to accommodate a majority of the staff.

Although no school based administrators lost their jobs because of consolidation, principals said that their workload increased and that they were put under additional stress because of the merger process. All three principals indicated that they saw themselves as buffers during the process. They commented that they tried to keep their schools out of the political debate that they saw occurring during the merger process. Principals also perceived themselves as key communicators during the merger process. They reported that they did a good job of keeping schools and students out of

the process. Principals also indicated that because of the amalgamation, central office had become more bureaucratic in nature. This they said created additional workloads for school administrators: they received less assistance and direction from central office, and the resource people on whom they once counted were no longer available. The principals also stated that restructuring changed their job role with more meetings to attend, these taking them out of the school more often than they would have liked. They reported that in the new more bureaucratic system, getting things done for the school took a lot longer than it did in the smaller jurisdictions. With fewer support and resource personnel available this expanded the workload for principals. All three principals also contended that their role as educational leaders had changed to something that resembled a middle manager. One of the principals indicated that because of the changes to central office personnel, policy, and procedures, principals had to relearn how things get done in the new school division. This has made it much more difficult for them to fulfill what they perceived as their mandate, that of providing quality educational services for students.

None of the participants perceived a significant impact on teaching personnel during the merger process. The three teachers indicated that although some trustees and central office personnel lost their jobs, this was not the case for teachers. The three teachers also said that early in the process, the rumors of teacher cuts created unnecessary stress and feelings of animosity. All three teachers were complimentary of the principals indicating that they did a good job of buffering schools from any cut backs and politics associated with the merger. A number of participants indicated that with so many changes taking place at the same time, it was difficult to distinguish which of the changes caused any particular outcome or effect.

All of the principals indicated that the new structure was more bureaucratic and difficult to deal with. They contended that moving from the smaller jurisdictions that had fewer people in central office had created some stress and anxiety in the schools.

All respondents reported that in the smaller jurisdictions everyone knew most everyone else and superintendents knew almost every staff member on a professional basis. This created a sense of closeness that no longer existed in the larger system. The three principals reported that they now felt like “one of the crowd” and that personal service by superintendents no longer existed. They claimed that the time it took to get something done had greatly increased, which, in the opinion of principals and teachers, had reduced the effectiveness of the system and the services it provided.

Although participants outlined a number of negative aspects of the merger relevant to personnel, generally they agreed that being part of a larger school jurisdiction had some benefits. Some of the participants indicated that regionalization had created more professional opportunities for them. The opportunity to obtain an administrative position had increased because there were more schools and positions available. Having more schools in more communities also opened the door for staff transfers. Teaching and support staff could now become involved in a variety of different programs and initiatives that became available because of more programs at more schools.

Efficiency and Effectiveness

The fifth issue arising from the analysis of interview transcripts concerned the degree to which the new enlarged jurisdiction was more efficient and effective than its three predecessors. The concepts of efficiency and effectiveness were understood by participants to mean money saved, and providing better services for students and employees. The enunciated aim of the government was to increase the levels of both efficiency and effectiveness in education through the merger of school jurisdictions.

The new superintendent and secretary treasurer both estimated the total one-time savings realized through consolidation to be about \$600,000. These savings were the result of: (1) reducing the number of trustees from 26 to seven; (2) downsizing the

number of central office administrators from ten to eight; (3) eliminating two central office support positions; (4) closing two central office locations; and (5) consolidating a number of departments like transportation and maintenance. While over a half million dollars was reportedly saved, some participants indicated they felt the merger process cost more money than it saved. Although participants were unable to provide budget figures for all of the expenses, they did identify a number of areas where extra costs were incurred as a result of the merger. These were: (1) the renovation of the new central office for approximately \$600,000; (2) severance packages and employee by-outs for three individuals; (3) time, energy, supplies and resources used during the consolidation process; (4) contracting one of the superintendents to head the policy development committee after he accepted a severance package; and (5) and in addition there were some non-dollar costs such as collateral costs associated with the added workload, stress, and impact on the personal lives of trustees and employees. These identified costs could be categorized into three areas: (1) direct dollar costs like the renovations and severance packages; (2) indirect dollar costs like foregone income that could have been used in other ways. For example the workload added to employees as a result of consolidation could have been used for such things as instructional improvement; and (3) non-dollar costs that may have made some aspects of the system less effective because of stress and low moral. These dollar and non-dollar costs have not been calculated by the new jurisdiction and were not included in the government's analysis of the process.

Contrary to what most of the participants expected, the savings attributed to amalgamation remained with the government and were not passed on to the new jurisdiction. The secretary treasurer indicated that any efficiencies achieved through the merger process did not translate into additional dollars for schools or programs. All school level participants expressed great disappointment that the government did not

keep its promise that savings were going to be used to increase funding and programs for students.

All respondents contended that there were no efficiencies created at the school level because of the merger. They all agreed that consolidation provided no financial windfall for schools. The principals and teachers both reported that instead school funding had decreased, resulting in larger class sizes and the reduction of teaching and support staff. Most of the study participants were uncertain of whether the merger or other concurrent changes created this result.

Most of the interviewees reported that there was either no change or a reduction in the effectiveness of the new system. The central office had become larger and perceived to be more bureaucratic which did not add to the effectiveness of the system. Some central office administrators claimed that the new system required more “democratic activity.” That, they explained, translated into more discussion, more meetings, expanded monitoring and evaluation, and more people involved in the decision making process. With more time being spent in these areas there was less time to spend on students. Had the learning process or learning outcomes improved following the merger? Participants stated they couldn’t discern a difference.

Some respondents indicated that in terms of choices available, the new jurisdiction was more effective. With more schools in the jurisdiction the opportunity for teachers to transfer to a new school was greater than before. School based administrators also reported increased opportunity to move to an administrative position in a school of a similar type to their current school or to one quite different from it. Several interviewees claimed students now had a greater choice of schools and programs. They said the transportation system had become more effective in that it served the needs of many more students. A number of specialized programs had been established to meet the needs of a variety of students. Special needs programs, a cyber school, and the store front school were all a result of consolidation.

Educational Bottom Line (Students and Programs)

The educational organization exists because of the need to educate all future members of society. The critical issue for all the study participants was whether or not the newly-enlarged jurisdiction improved student learning.

Most of those interviewed claimed that the amalgamation had no impact on students and programs. They explained that reorganization was implemented to reduce the number of school jurisdictions in the province. This reduction was meant to save millions of dollars in administrative costs. It was not, some said, intended to change or improve educational opportunities for students. The merger neither increased nor decreased the number of teachers or support staff in schools. Money was neither taken from nor injected into schools because of consolidation. Most participants indicated that other changes like site-based management and student funding reductions were responsible for any changes affecting students and programs. This disappointed many of the participants who stated that too much emphasis had been placed on money instead of children and the three R's. The outcome seemed to be cost savings rather than an improved educational program for children. This follows Campbell's (1999) findings in which he states:

Restructuring is not necessarily achieved through external programs, resources, facilities, or district or state mandates. Indeed, meaningful restructuring first takes place within the minds of teachers and their beliefs about the nature and possibilities of their students. From there, all else follows. (p. 97)

As indicated previously, some of the participants felt that consolidation had led to more choice for students. This was made possible by the enhanced transportation system that provided greater opportunity for students to attend the school of their preference. Greater mobility also allowed students to enroll in programs at other schools that may not have been available at their local school. As a result of the amalgamation, the increased student numbers created opportunities for the establishment of new programs like those available in the new store front school and the cyber school. The opportunity for students with special needs to enroll in a

program specially designed for them was also enhanced. Many of the respondents commented that one of the indirect benefits to students was the increased ability of a larger jurisdiction to provide enhanced professional development opportunities for teachers.

Review

The major issues areas related to this study were based on the perceptions the participants had of the consolidation process. While each story and circumstance was unique, a number of common threads united the personal experiences, feelings, and emotions described by the respondents. Six major issue areas were extracted from the participants views and stories that focused on: (1) the need for merger; (2) the merger process; (3) system size; (4) the impact on personnel; (5) efficiency and effectiveness; and (6) the educational bottom line relating to students and programs.

The final chapter addresses the conclusions, discussion, and recommendations for further research related to this research.

CHAPTER 7

Conclusions, Discussion, and Recommendations

Incomplete maps in either research or practice limit our ability to understand and manage organizations. They make it hard to explain variations and fluctuations in data from different organizations. The inability to consider multiple perspectives continually undermines efforts to manage or change organizations. Important new technologies fail because of inadequate attention to retraining the workers who must implement the new methods. Sophisticated training outcomes disappear when people with new skills find themselves back in the same old roles facing the same pressures as before. Efforts to empower lower-level participants run afoul of traditional authority patterns, and cultural changes are derailed by entrenched political interests. If there is a lesson here, it is that complex realities require complex approaches. (Bolman & Deal, 1991, p. 309)

Introduction

Through the use of in-depth interviews, fourteen individuals shared their feelings and stories relevant to the transformation of a newly restructured school jurisdiction. The researcher heard and recorded stories that were criss-crossed with joy and pain, hope and despair, and trust and disbelief. As these individuals shared their stories and circumstances, the complex and multidimensional perspectives of change and restructuring began to emerge. The analysis of the data led the researcher to numerous findings that were subsequently organized into the following six major issue areas: 1) the need for restructuring, 2) the restructuring process, 3) system size, 4) impact on personnel, 5) efficiency and effectiveness, and 6) the educational bottom line relevant to students and programs. Further analysis of these issue areas led to the development and discussion of five conclusions and numerous recommendations for further research and practice.

This chapter is organized into three sections: (a) conclusions, (b) discussion and implications, and (c) recommendations for research and practice.

Conclusions

The following conclusions were drawn from the study:

1. The need for these three school jurisdictions to merge was never fully established.
2. The implementation costs associated with the merger exceeded any resulting savings.
3. Consolidation was not seen to have brought about any significant educational reform.
4. The increase in jurisdiction size provided students, teachers, and administrators with additional personal and educational opportunities.
5. Participants were affected differently by the merger process.

Discussion and Implications

Conclusion 1. The need for these school jurisdictions to amalgamate was never established. All participants strongly contended that their previous school jurisdictions were very effective and efficient systems. None of the jurisdictions were in financial difficulty. Student achievement was reported to be above the provincial standard. Administrative costs were claimed to be low and community involvement at both school and jurisdiction levels high. Participants reported that co-operative programs with surrounding jurisdictions and municipalities were ongoing, and that creative strategies had been pursued to maximize existing resources. School and central office participants reported that system survey results rated parent and student satisfaction as high.

Given these perceptions, participants claimed the government had no valid justification for dissolving the existing jurisdictions and creating a new consolidated school division. Justification for the reduction of school jurisdictions in Alberta appeared to be related to reasons other than quality education for students. Peters

(1999) agrees with this review and states, “There is little doubt in the minds of educators in Alberta that the compelling ideology behind the government restructuring was financial in nature and had nothing to do with the improvement of learning or the enhancement of teaching” (pp. 86-87). Macpherson (1995) speaking more generally about educational restructuring, also supports this notion indicating that the overriding concern driving educational reform is political accountability.

Participants contended that because of the financial difficulty of some jurisdictions, and the political pressure school boards were exerting on the government, the government based its decision to merge school jurisdictions in Alberta on two key issues: one, the political silencing of school board trustees by reducing their numbers across the province and redefining their roles, and two, reducing overall funding to education by cutting system administration levels.

These were not the same reasons as earlier cited by the government. The 1994 *Alberta Education Guide to Regionalization Guiding Principles* stated that the intent of “amalgamation/regionalization” was, “to create larger, more efficient jurisdictions which will maintain and improve educational opportunities for students” (p. 5).

Most trustees contended that what the government seems to have done, is alienate and polarize school boards and the Alberta Department of Education. They claimed that by not acknowledging that these jurisdictions were doing a good job as stewards of the public trust, they have shown that when some jurisdictions get into fiscal or political difficulty, all jurisdictions will be dealt with in the same manner. These trustees reported that by failing to actively consult and make changes where needed, instead of across the province, a lack of trust and co-operation has apparently been established between school jurisdictions and the government. All participants expressed concern and disappointment that the restructuring process was a top down government edict directed at reducing the number of trustees and decreasing administrative expenditures. In the opinion of respondents, the process was conducted

without appropriate planning, communication, and evaluation. A well planned and openly communicated approach to amalgamation would likely have assisted the participants in this study in justifying the move to unite with the surrounding jurisdictions. From the participants' perception, the need for positive ongoing communication supports the findings of Barr (1985), Alexander (1990), and Tattersall (1994) who indicate that successful mergers provide for the involvement of all stakeholders in the planning and implementation process.

Conclusion 2. Most participants claimed that the costs associated with the merger of Bowlen, the County of Elcot, and Pearl City far outweighed any recognizable savings. The secretary treasurer reported that the savings realized through the consolidation of the three school jurisdictions were estimated to be about \$600,000. He indicated that the savings were accrued in a variety of ways. The number of trustees was reduced from 26 to seven. There was a reduction in central office personnel: an administrator, a secretary treasurer, and two support personnel accepted severance packages. Two central offices were shut down and numerous services were consolidated.

Although no income-expenditure figures were available to document the net result, the new superintendent and secretary treasurer reported that expenditures related to the regionalization process appeared to outweigh any savings. They commented that the costs of regionalization were viewed as falling in two categories: hard costs which related to personnel and capital expenses, and the soft costs associated with personnel time and emotion.

Hard costs included severance packages that were awarded to an administrator, a secretary treasurer, and two support personnel. An individual was hired on a short term contract to write new policy for Ebony Pines. A building was first leased and then purchased for the new central office, and subsequently renovated for the approximate cost of \$600,000. New furniture, equipment, letterhead, technology, and

communication systems were purchased and installed. Additional staff was hired in the transportation, maintenance, and technology departments. This would seem to support Chamber's (1983) findings that mergers actually increase administrative and support staff costs.

The soft or collateral costs associated with the consolidation involved countless meetings with trustees, communities, MLA's, other jurisdictions, and business groups. Trustees and administrators faced additional workloads as they struggled at building a new jurisdiction while maintaining their old school systems. Competent people left the system, and the stress and anxiety of the process took its toll on all employees.

Simple mathematics shows that any savings attained were likely lost in the costs of renovating the new central office. If the other costs were to be calculated, expenditures would far outweigh any savings. A 1995 study by the Ontario Public School Boards' Association also found that start-up costs for school system amalgamations far outweighed any savings.

Even the government encountered difficulty in accurately accounting for any savings realized through the amalgamation process. Peters (1999) stated:

Initial estimates from the Alberta School Boards' Association (ASBA) indicated that the government hoped to save as much as \$20 million from this reduction. More conservative estimates, however, were put forward by Alberta Education. The ministry first suggested a possible saving of about \$13.5 million, but later, in an affidavit to the courts, it provided the figure of about \$12.9 million per annum savings and acknowledged that these savings might come more slowly than anticipated, as contractual obligations and buy-outs were negotiated with surplus staff. (p. 86)

To the time of writing, the researcher had been unable to find government information that reported the costs of implementing school district mergers throughout the province.

The secretary treasurer indicated that one of the disappointing aspects of amalgamation was that the savings realized through the merger of these school jurisdictions did not result in additional dollars for Ebony Pines. Savings were realized by the provincial government through a reduction in the overall funding provided to

school jurisdictions. The local jurisdictions did all the work, paid for the expenses associated with the process, and yet it was apparently the provincial government that realized all the savings. Compounding the problem of reductions in overall funding, the provincial government also took away the authority of school boards to requisition local education taxes.

In the end, the provincial government's goal of efficiency was apparently not realized. Some participants commented that it took more money to implement the process than was saved at the local level, and the resulting larger school system has had to hire additional staff to meet the needs of the new and larger organization. The net result did not appear to be a more effective and efficient system but instead a reorganized approach, that in the view of respondents, had ended up costing more to maintain and operate. These findings support research by Guthrie (1980), Giles and Proudfoot (1990), Bolman and Deal (1991), Tomasko (1992), and Wells (1993) who found little or no savings as a result of amalgamation.

Conclusion 3. Participants in this study claimed that the opportunity for positive educational change that would benefit students and the delivery of educational services was lost. Through the process of amalgamation, in 1994-95 the provincial government reduced the number of school boards to 63. Approximately a year later, health boards were reduced to 17, and in 1998-99, 17 co-terminus child services boards were established. Some trustees and superintendents in the study indicated that they have long been calling for the consolidation of childrens' services which would include education, health, welfare, and social services under one minister and government authority. With some additional planning and consultation, the consolidation of childrens' services could have become a reality. This would have been perceived as a real change in the way education and other services would be delivered to children.

The consolidation of the three jurisdictions was perceived by most participants as a takeover by the largest jurisdiction. Three local school jurisdictions were merged into one, yet the resulting organizational chart remained largely unchanged. Some of the participants claimed that amalgamation provided an opportunity to create a new management model that would eliminate the hierarchical school management model. A more site based, co-operative team management configuration could have resulted.

Before consolidation, all three jurisdictions had agreements with local municipalities for the sharing of a variety of services. To limit costs, the County of Elcot School Board shared a building and administrative services with the Municipal arm of the county. They also worked together on transportation and maintenance. Bowlen and Pearl City has similar cost savings agreements. Items like snow removal, grounds maintenance, and facility sharing agreements were in place to reduce costs. Following the merger, most of the participants indicated that none of the earlier sharing agreements were in place. Ebony Pines Regional School Division was now responsible for the operation and maintenance of all its services. Positive change should provide for organizational accountability, and the opportunity for public and private organizations, to share services, personnel, and programs. By not working together, efficiency and maybe more importantly, the sense of community and co-operation that was developed in the past had been lost.

The restructuring process created numerous changes in system operations for the Ebony Pines organization and its employees. Bolman and Deal (1991) in writing about organizational change stated:

Change affects more than roles and skills. It alters power relationships and undermines existing agreements and pacts. Most important, it intrudes upon deeply rooted symbolic agreements and ritual behavior. Below the surface, the social tapestry begins to unravel, threatening the organization's collective unconscious and existential character. Adding political and symbolic elements to an already complicated mix of people and structure can create a potentially explosive situation. (pp. 375-376)

These negative effects can be drastically reduced if change is planned, people feel they are part of the change process, and the resulting changes produce positive results.

Conclusion 4. The issue of system size contains a certain element of paradox. While all participants felt a sense of loss at the dissolution of the three smaller school jurisdictions, they agreed that the larger school division provided both students and employees with additional personal and educational opportunities. The same sense of ambiguity was seen by Gooding and Wagner (1985), Monk (1987), and Walberg (1992). These analysts indicated that smaller jurisdictions showed higher levels of student achievement and community satisfaction whereas larger districts provided more choice of programs and services. This same sense of having to reconcile a “trade-off” was described by the participants.

Ebony Pines is home to approximately 8,500 students housed in 24 schools. Many of the schools are under utilized and additional population growth could easily be handled within the current system. A system size of about 12,000 students was seen by all of the former superintendents as an appropriate size for a school division like Ebony Pines. An increase in student population would result in additional provincial grant revenue that could be used to enhance and diversify programming for students even more than occurred following the merger.

All of the trustees and former superintendents indicated that the increase in system size resulting from the consolidation created a number of positive educational opportunities for students. Accessibility to specialized programs was perceived by all respondents as a positive move. Students from one area of the division could now access transportation and programming in another centre without having to pay out-of-district tuition fees. A larger range of programs was made available. With the increase in student numbers, programs that smaller jurisdictions could not afford to operate were now economically feasible. More diverse special needs programs, a cyber school, a

store front school, and enhanced technological programs were made available to students across the division. This increase in programming provided students and parents with greater choice to meet the changing demands of education and the job market.

Teachers and administrators reported that they were also provided with the opportunity for change and growth. More diverse programming for students allowed teachers the chance to re-evaluate their teaching. More schools in the division allowed teachers greater flexibility to transfer to another school, and more opportunity to apply for a school-based or central office-based administrative positions in the enlarged jurisdiction. These changes provided professional and support personnel greater opportunity to grow personally and professionally. Another indirect benefit to students and programs was the increased ability of a larger jurisdiction to provide enhanced professional development programs for teachers.

Although there were many positive aspects related to the increase in jurisdiction size, all participants reported a sense of loss for some of the things that only smallness can achieve. Trustees stated that a certain level of personal contact with their constituents was lost. With fewer trustees and a larger geographical area to cover, trustees in the new division had to represent a much larger and diverse group of people.

All participants also indicated that the sense of family and closeness in the division was lost. In the smaller jurisdictions participants contended that the probability was greater that parents, teachers and others would know each other and the school system's administrators. The larger jurisdiction dictated a more bureaucratic and impersonal approach. These feelings of loss are supported by the writings of Bilow (1986), Oakerson (1992), and Ramirez (1992) who indicate that system size should be based not only on student numbers but on issues like community demographics, population density, and meeting student needs.

Although there were some sense of loss, overall the respondents described the increase in jurisdiction size as beneficial to student programming. Increased growth, either through population growth or a second round of amalgamations, could provide additional program development.

Conclusion 5. Each of the participants in the study was affected differently by the merger process. Before the process began, most participants stated that they were stressed and concerned about the process and the outcome.

As indicated earlier, the number of trustees was reduced from 26 to seven. Two of the trustees interviewed reported that most of the former trustees did not seek election to the new board. They commented that those who remained on the transition team and were later elected to the new Ebony Pines board had their workload increase and their job roles changed. The trustees interviewed claimed that they had to implement government changes, take the political fallout for the changes, pay for the process, and that the government reaped the political and financial benefits.

Most superintendents reported that they had their workloads double and their stress levels go up significantly. They were responsible for operating the existing school jurisdictions while developing a plan and process to create a new consolidated school division. Job security was a major issue and in the end one superintendent was given a severance package, one remained as the superintendent of the new jurisdiction, and the third was demoted to a deputy position. These former superintendents reported that they were expected to save the government money by merging jurisdictions. They were required to achieve this goal by expending their own budgets and time. The reward was a reduced budget allocation.

All of the principals interviewed perceived themselves to be buffers in the process. They reported that they were not directly involved in the process but that their mission was to keep the politics of the mergers out of the schools. Stress levels were

considered high among administrators because of the unknowns. Some principals claimed they lost those whom they perceived as allies in central office, and this created a need for changes relating to the way that they operated within the new jurisdiction. One contended that he went from being a big fish in a small pond to a small fry in a big pond. The feelings of the principals find support in the research of Tomasko (1992) and Lei and Hitt (1995) who indicate that mergers are a very agonizing and stressful process where managers become less involved in risk taking strategies.

Some of the teachers also reported some degree of stress because of the unknowns but indicated that they did not perceive any changes to the way they operated in classrooms. They expressed appreciation for the enhanced opportunities to transfer to new schools and to apply for administrative appointments. These teachers also indicated that program offerings and professional development opportunities were increased because of consolidation.

All participants claimed that they were differently affected by the process but as direct involvement increased in the process, so did the level of impact. The more involved the individual was in the process the more the merger affected them personally and professionally. Galvin (1986), Shepherd (1988), Sharpe (1989), and Hall (1994) reported widespread dissatisfaction among participants of amalgamating districts. This dissatisfaction was a direct result of a lack of participation in the process and the loss of small community status.

Recommendations for Further Research

This research was an interpretive case study, therefore, care must be exercised in drawing generalizations from it. The value of this research lies in the identification of certain aspects of educational and organizational reform related to restructuring. The data generated by this study present several areas that may warrant further research.

1. A similar study that encompasses a larger number of merged jurisdictions. A broader based study would allow for expanded comparisons and generalizations related to educational and organizational reform as a result of mergers.
2. A longitudinal study that compares student achievement before and after restructuring to determine whether there are increases or decreases in achievement, and the sources of these changes.
3. An in-depth analysis of the fiscal costs and savings relevant to school system mergers.
4. Research related to determining whether economies of scale are operative in rural school jurisdictions, and if they are, to determine the optimum size of such jurisdictions.
5. A study that looks at the costs and benefits of combining children's services (education, welfare, social services, health, etc.) under one authority or ministry.

Recommendations for Practice

One of the purposes of this study was to assist the government, policy makers, the public, and practitioners to more fully understand the political, educational, and organizational implications of school system restructuring. The information analyzed in this study along with the literature reviewed provides for a number of tentative recommendations for practice.

1. This study and the related literature reviewed suggest that those planning to restructure organizations like school jurisdictions, should ensure there is a clear need for amalgamation, that the merger process be planned with all stakeholders involved, and include checks and balances during the process. Following these steps is likely to enhance the chances that the change will be meaningful and supported.
2. There was apparent need to conduct a cost analysis before embarking on an organizational change of the magnitude entered into in Alberta. Other jurisdictions

contemplating similar changes should ensure that the anticipated savings are actually attainable and if the change is not economically driven, then the restructuring should be marketed relative to its more probable benefits.

3. When restructuring organizations with elected boards, there would appear to be great advantages for the change to coincide with the terms of office of the board members. This would save the cost of conducting a re-election and would also ensure that the electoral process remains democratic.

4. Changes in the way educational organizations operate should ultimately translate into enhanced student learning and academic success. The reason schools and school jurisdictions exist is to provide optimal educational opportunities for students. The main purpose of restructuring should be based on improving those opportunities.

Review

The purpose of this research was to obtain the perceptions of trustees, superintendents, principals, and teachers about the transformation of a newly merged local school jurisdiction and the impact of that merger relevant to school system operations. The investigation was conducted as an interpretive case study, using in-depth analysis.

The major research question focused on:

What impact has restructuring had on the three school jurisdictions that were merged into one regional school division? More specifically, this study addressed questions related to:

- 1) change and the implementation process
- 2) impact on personnel, their jobs, and their responsibilities
- 3) organizational structure, policy, and system culture
- 4) jurisdiction size
- 5) effectiveness and efficiency, and

6) the delivery of programs and resources to schools and students.

Fourteen participants shared their experiences and perceptions relevant to the restructuring process, its effect on them and on school system operations.

The study was undertaken as an attempt to further understand the impact of educational restructuring in the Province of Alberta. The findings of this study should assist the government, policy makers, the public, and practitioners in the field of education to more fully understand the political, educational, and organizational implications of large scale educational restructuring.

It is the hope of this researcher that this case study provided the reader with a well grounded understanding of the impact of restructuring on the fourteen participants and the three former jurisdictions that became Ebony Pines Regional School Division. As Cooper (1996) introduced this study on page one with questions pertaining to change, the researcher believes that this study has answered these questions as they relate to *Restructuring Alberta School Systems*.

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Appendix A
Interview Questions

Interview Schedule

Impact Of School District Regionalization Research Questions

1. Describe your view of the implementation process as it related to the amalgamation/regionalization of your school district.
2. What were the positive aspects of the process?
3. What were the negative aspects of the process?
4. What impact did regionalization have on personnel, their jobs and their responsibilities?
5. How has regionalization had an effect on organizational structure within your jurisdiction?
6. What organizational structure would best serve the newly regionalized district?
7. How has regionalization had an effect on school district policy?
8. How has regionalization had an effect on school district culture?
9. Has the increased size of the newly created district had any effect?
10. What effect has regionalization had on the effectiveness of the school district?
11. What effect has regionalization had on the efficiency of the school district?
12. What effects have you seen in the delivery of programs and resources to schools and students as a result of regionalization?
13. How has regionalization affected you personally?
14. Has regionalization had any other impact on the education in your school district?
15. Is there anything else that you would like to share about the effects of regionalization? Or your feelings about the process?

Appendix B
Consent To Participate

Consent To Participate In The Study

Department of Educational Policy Studies
7th Floor Education North
University of Alberta
Edmonton Alberta, T6G 2E1

May 6, 1997

Dear Participant,

I am a graduate student in Educational Administration at the University of Alberta. As part of doctoral degree requirements, I am undertaking research on the impact that the recent amalgamation of school districts has had on the operation of your enlarged school district.

The purpose of this study is to examine and describe the transformation of a newly regionalized school district and to analyze and identify the impact on the operations of the school district. Data obtained should provide important insights into the process and impact of school district amalgamation in the province of Alberta.

The participants in the study will include trustees, superintendents, deputy superintendents, the secretary treasurer, three principals, and three teachers each from an elementary, junior high and high school that represent the three school districts before regionalization. The schools and respective participants will be identified by the superintendents as those perceived to have been especially affected by the regionalization process. This will provide a total of 14 participants.

Participant interviews will last approximately 60 to 90 minutes. All interviews will be audio-recorded. The recorded interview tapes will be transcribed by a typist who will maintain the confidentiality of the respondents. Transcripts, or portions of the interview may be reviewed with you to verify that the interpretation of the information is accurate.

You have the right to withdraw from the study, without penalty, at any time. Should you have any questions or concerns about the study or your participation in it, please contact me by telephone (Res. 962-2893, Bus. 492-4909) or by mail at the above address or the supervisor of my research, Dr. Frank Peters at the University of Alberta.

You and the other participants are guaranteed confidentiality as pseudonyms will be used in the dissertation. Neither the schools nor the district will be identified. Each interview will be conducted in private and you will not have to answer any questions with which you feel uncomfortable. Participants will be informed that only the researcher and transcriber will have access to the interview tapes, and that the tapes will be magnetically erased at the conclusion of the study. Assuming you agree to participate, a verbal explanation about this will be provided at our first meeting.

If you are willing to participate in this study, please indicate by signing in the space provided below. An extra copy of this letter is provided to you for your record.

Sincerely yours,

David Psysk

I grant David Psysk permission to include me in the research study described in this letter.

Signature _____ Date _____

Appendix C
Correspondence

11 Belleville Avenue
Spruce Grove, Alberta
T7X 1J3

June 16, 1997

Participant
Address

Dear Participant,

As I continue with my research on the impact of school district regionalization/amalgamation, I have many occasions to sit back and reflect on the valuable data and information that I have collected. Your honest and detailed contribution has provided me with many rich and thick descriptors of the process and impact as it pertains to Ebony Pines. I would like to thank you for the time and effort you took to contribute to my study. It is greatly appreciated. Thank you and have a great summer.

Sincerely,

David Pysyk

11 Belleville Avenue
 Spruce Grove, Alberta
 T7X 1J3

November 12, 1997

Participant
 Address

Dear Participant,

Please find enclosed a copy of the transcribed taped interview that we had regarding the impact of school district regionalization/amalgamation. Your responses have provided me with substantial data as to the process and impact as it pertains to Ebony Pines.

Please take this opportunity to review the transcript, make corrections, and or include clarification or additional information should you see a need. Upon completion of your perusal, please sign and date this letter and the front page of the transcript, indicating that you have had an opportunity to review the transcribed interview and make any required adjustments or corrections. A self addressed envelope has been included for you to return the signed letter and transcript to me. Thank you for the opportunity to discuss the regionalization issue. Your time, energy, and contribution to the study is greatly appreciated.

Sincerely,

David Pysyk

I HAVE HAD THE OPPORTUNITY TO REVIEW THE TRANSCRIPT OF MY INTERVIEW WITH DAVID PYSYK REGARDING THE ISSUE OF REGIONALIZATION/AMALGAMATION AND HAVE MADE ANY NECESSARY CHANGES AND ADJUSTMENTS.

Signature _____ Date _____