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The consolidation of Ypsilanti Public and Willow Run Community Schools: Lessons learned and policy considerations

Scott A. Menzel

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The Consolidation of Ypsilanti Public and Willow Run Community Schools: Lessons
Learned and Policy Considerations

by
Scott A. Menzel

Dissertation

Submitted to the Department of Leadership and Counseling
Eastern Michigan University
in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY
Educational Leadership

Dissertation Committee:

William Price, PhD, Chair
Jaclynn Tracy, PhD
Theresa Saunders, EdD
Russell Olwell, PhD

June 30, 2016

Ypsilanti, Michigan

DEDICATION

This dissertation is dedicated to the youth of Ypsilanti who deserve high quality educational opportunities that will prepare them for a successful future. (Jeremiah 29:11)

ACKNOWLEDGMENTS

Those who have completed a dissertation know and understand the sacrifice required on the part of the family of the individual completing the work. I am grateful for the love and support of my wife, Tammy, and two daughters, McKayla and Madyson, who encouraged me throughout the process of conducting the study and writing the dissertation. Many other opportunities were set aside in order for me to accomplish this goal and their sacrifices have not gone unnoticed. I am truly blessed to have such a supportive and understanding family.

My team at the Washtenaw Intermediate School District is outstanding. Their dedication and commitment to equity, inclusion, and social justice was the driving force behind the work in supporting the consolidation effort. The key leaders at WISD sacrificed a significant amount of their time and energy in order to ensure that the youth in Ypsilanti have educational opportunities leading to greater likelihood of success. The following individuals participated in various ways during the time period studied in this dissertation and deserve to be acknowledged: Brian Marcel, Sarena Shivers, Naomi Norman, Jennifer Scott-Burton, Karen Erhardt-Domino, Alan Oman, Margy Long, Gerri Allen, Emma Jackson, and Holly Heaviland. Because of the work facilitated by the WISD, much of the archival information that supported this study was retained in hard copy or electronic files at the WISD. Special thanks to Karen Allen, my assistant, who helped track down a number of important documents and provided encouragement along the journey toward completion along with Emma Jackson, communications and public relations specialist, who photographed and made available most of the pictures included in the study. She also read a number of chapters for coherence and initial edits. I also want to express appreciation to Betty Ivers who reviewed

and edited the final manuscript and worked within very tight deadlines with a keen eye for detail. Finally, my assistant superintendent for achievement, Naomi Norman, has been a tremendous thought partner not only during the consolidation effort, but as I worked to conduct this study on the first phase of the consolidation. Her dedication and commitment to the ongoing work in Ypsilanti is remarkable.

I am grateful for my dissertation committee. Dr. Price willingly agreed to serve as my chair as I recommitted to completing a journey that started more than a decade ago. His background as a successful superintendent in Michigan coupled with critical suggestions along the way helped ensure the document met the standards of quality at EMU. Dr. Tracy has been my advisor since I enrolled in the specialist program at Eastern Michigan, and she has provided advice and counsel over the years that contributed in important ways to my professional success. Dr. Theresa Saunders provided encouragement as well as helpful suggestions along the journey. A special thanks is due to Dr. Russ Olwell who agreed to read very rough drafts of each chapter early in the process and provided suggestions for where more information was needed. Together, this dissertation committee helped me accomplish an important milestone in my educational career, and I cannot think of a better group of mentors and guides throughout this process.

I want to thank the Washtenaw ISD board of education. When they hired me in 2011 little did we know what the journey would entail. However, each member of the board of education during the consolidation process—Greg Peoples, Diane Hockett, Mary Jane Tramontin, Dayle Wright, and Mark VanBogelen—all had a fundamental commitment to the importance of our work on the eastern side of Washtenaw County. What we were able to accomplish would not have been possible without the vision and support of this outstanding

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ABSTRACT

The purpose of the study was to understand the lessons learned and policy considerations from the successful vote to consolidate the Ypsilanti Public and Willow Run Community Schools. In the past thirty years, only four consolidations have been approved by voters in Michigan; and at least nine consolidation proposals were rejected. Of the successful consolidation votes, three were small rural districts with student enrollments of less than 1,000 when the districts merged. The consolidation of Ypsilanti Public and Willow Run Community Schools represents a unique case. The combined student enrollment at the time of the consolidation vote was approximately 4,800 students. Each district was in deficit and struggling with achievement.

The literature on consolidation of districts focuses primarily on small and rural schools. Arguments in support of consolidation typically address economic efficiencies or increased educational opportunities. This study contributes to the literature by investigating the consolidation of two urban, mid-sized districts as an attempt to address both financial and academic challenges. The research was conducted as a qualitative historical case study. Leaders in the process were interviewed, and the researcher analyzed the background conditions and historical context in order to understand why this consolidation effort was successful.

The conceptual framework for evaluating the findings included three core concepts: transformational leadership, policy entrepreneur and the policy window, and the Greek concept of *kairos*. Key findings included the importance of understanding the historical context from a social, political, and economic perspective. These conditions were determined to be necessary for the successful consolidation vote but insufficient to explain

why the consolidation occurred at this time and not at another. In order to take advantage of the opportunity (*kairos*), transformational leadership was required, coupled with policy entrepreneurs who were able to address the key policy barriers. The convergence of the right time, transformational leaders, and policy entrepreneurs provided important insights with respect to why this effort was supported by 61% of voters in both communities. The lessons learned provide guidance to other districts contemplating consolidation as well as to policy makers attempting to promote additional consolidation of districts.

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CHAPTER 1: INTRODUCTION AND BACKGROUND

When you find yourself beginning to connect with a significant future opportunity, first say yes, then do it, and only then ask whether it's possible.

—Otto Scharmer

On June 15, 2011, a meeting of some consequence was held at the Washtenaw Intermediate School District (WISD). The school board presidents from Ypsilanti Public Schools and Willow Run Community Schools requested a meeting with me, the incoming WISD superintendent, along with the interim WISD superintendent, the superintendents from both districts, and a former Willow Run superintendent. The purpose, as they identified it at the time, was to determine whether WISD would be willing to help facilitate conversations between the two districts related to shared services that could possibly lead to more meaningful dialogue around eventual consolidation. The board presidents met previously to begin the conversation, but they quickly realized that the history between the two districts necessitated a neutral third party to ensure that the interest of both districts would be respected.

Background

The Ypsilanti Public School district served students of the community since the late 1840s. At its zenith in the 1980s, the district served more than 8,000 students. However, as manufacturing jobs left the area and economic downturns hit, enrollment declined so that at the time of the June 2011 meeting, student enrollment in Ypsilanti was down to roughly 3,800 (Michigan Department of Education, August 2011). In addition to declining enrollment, the district depleted their relatively healthy savings account—in 2003 they had nearly \$10 million in reserves (see Table 8)—to the point where they became a deficit district in 2009. The continued decline in student enrollment, coupled with a reduction in state

funding in 2011 and failure of the school board to make the difficult decisions to address the structural deficit, resulted in a deficit that more than doubled each year and was at \$8 million and projected to continue growing. Making matters more difficult, the high school had been identified as a “persistently low-achieving” school, meaning in academic performance it was in the bottom 5% of all Michigan schools and was in the process of implementing a turn-around plan. With poor academic performance across the district, a high school on the persistently low-achieving list, and deficit status, the Ypsilanti Public School District was on the verge of having an emergency manager appointed by the state to take control of the district.

Across town, the Willow Run Community School District was struggling with a similar narrative, although Willow Run entered deficit status in 2005. While both Ypsilanti Public Schools and Willow Run Community Schools serve students in the 48197 and 48198 zip codes, the schools have been historical cross-town rivals. Willow Run Community Schools emerged as an outgrowth of the population surge in the 1940s as families moved into the community to work in the Willow Run bomber plant during World War II. The migration of families—many from the south—into the area was not a welcome change for many in historic Ypsilanti. In 1944, the Willow Run Community School District was established. At the height of its enrollment, Willow Run Community Schools served more than 4,300 students. However, as in Ypsilanti, the economic downturns in the 1990s and during the first decade of the twenty first century hit the community hard. Enrollment in 2011 was down to about 1,680 students (Michigan Department of Education, August 2012), and the deficit was nearly \$3 million (see Table 9). Achievement issues in Willow Run were also a significant concern, with multiple buildings on the persistently low-achieving list, including

the high school and an elementary school. Willow Run had recently closed two elementary buildings and reconfigured the district in an attempt to address the deficit spending.

However, even when the district made those difficult decisions, the decline in enrollment, coupled with the \$470 per student reduction in funding in 2011, put them back in a “death spiral,” a situation where the combination of declining enrollment and budget shortfalls resulted in cuts that led to additional loss of students, further exacerbating the economic challenges in a downward trajectory.

In Lansing, several policy developments contributed to the decision of the two districts to engage the WISD in conversations about shared services and consolidation. These included a reduction in the base foundation grant of \$470 per student, the emergency manager law (Public Act 4 of 2011), and the creation of the Education Achievement Authority (EAA) whereby buildings on the persistently low-achieving list could be removed from their local district and assigned to the EAA. These policies exacerbated the situation for both districts and constituted a threat to the continued existence of a public, locally governed education system in the Ypsilanti area. Prior policy decisions, primarily implemented in the mid-1990s under then Governor John Engler, also contributed to the current situation. These included the implementation of Proposal A, a voter-approved change in how schools are funded by shifting from primary reliance on local property taxes to state collection and distribution of funds on a per student basis; implementation of School of Choice legislation that permitted students to enroll in a neighboring district that opened its doors to choice; and the initiation and expansion of charter schools in a school of choice environment. By the time of the consolidation effort, these policy decisions resulted in Ypsilanti and Willow Run losing a combined total of 3,300 students to school of choice

representing approximately \$19 million in lost revenue. While these policies had a negative impact on the success of the former Willow Run and Ypsilanti School districts, there was one positive incentive available when the state approved \$10 million for consolidation of districts, a reasonably-sized incentive that informed the community conversation during the consolidation process given that these funds could be used to offset the cost of implementing a merger.

Statement of the Problem

Because consolidation happens infrequently in Michigan, little guidance is available for districts contemplating such a move. Since 1983, there have only been four district consolidations (D. Hanrahan, personal communication, August 3, 2015). In contrast to the Ypsilanti and Willow Run consolidation, the other three mergers were small rural schools, and in each case the combined district resulted in enrollment of fewer than 1,000 students. Conversely, the Ypsilanti/Willow Run consolidation represented the merger of two urban school districts with a significantly larger student population—more than 4,800 students at the time of the consolidation vote (Michigan Department of Education, August 2013). As Ypsilanti and Willow Run embarked on this journey, many of the key decisions were made without the benefit of a roadmap, starting with the pre-consolidation work through the transition period from the time of the successful vote to the actual launch of the new district. Many individuals, including school board members and superintendents who are contemplating consolidation efforts in their areas, have contacted this researcher to ascertain the lessons learned on our journey with the Ypsilanti Community Schools consolidation effort. The chairs of the K-12 appropriation committees, Senator Goeff Hansen and Representative Tim Kelly, have signaled an interest in providing additional incentives for

total district consolidation. There are numerous policy implications related to consolidation that emerged during the process that may inform future policy changes should consolidation continue to be an area of focus for elected officials in the State of Michigan. Too often the good intentions of elected officials lack the benefit of knowledge regarding the real world implications of their actions.

Purpose of the Study

The consolidation effort between Willow Run and Ypsilanti represents a significant undertaking without precedent in Michigan. Although there have only been four school district consolidations in the past thirty years, during that same time period, at least nine proposed consolidations were rejected by voters (Citizen Research Council, 1990). Three of the consolidations were small rural districts, and the districts were not insolvent at the time of the consolidation. Cox and Cox (2010) suggested that “the literature about consolidation is limited predominantly to studies of rural and small schools/districts; research regarding larger, urban schools/systems is remarkably negligible” (p. 83). From a policy and research perspective, consolidation has been promoted as a way to enhance economic efficiency as well as to increase educational opportunity for students (Howley, Johnson, & Petrie, 2011). Alsbury and Shaw (2005) noted,

Today, in light of declining enrollment, decreased funding, and demands for accountability, a renewed interest has been sparked to pursue consolidation as an option for improving efficiency, student achievement, and economic stability.

Advocates in some states predict that consolidation is the only realistic alternative for failing districts. (p. 116)

The purpose of this study is to identify the process and policy lessons learned and the policy considerations resulting from the voters' decision to consolidate the two districts. While the Ypsilanti Community School District is currently in its third year as a consolidated district and an overall assessment of the success of the merger remains to be studied, there is an important narrative regarding the historical and community context, process, and key decision points that will help inform future consolidation conversations as well as policy in the State of Michigan.

Justification and Significance of the Study

The Washtenaw Intermediate School District received a \$6 million consolidation grant from the State of Michigan as a result of the November 2012 vote approving the consolidation of the two districts. As the contract was negotiated, a senior department of education administrator noted to document the process in order to help create a roadmap for future consolidations. While funds were not earmarked for documenting the process, the need exists nevertheless. The historical case study provides valuable information for districts in Michigan that are considering whether consolidation is advisable and/or necessary. Unless there is a fundamental shift in demographic trends, such as declining birth rates, and the funding mechanism for public education, many of Michigan's school districts will be facing economic collapse. In fact, numerous school districts each year are on the deficit district list, and recent policy changes (e.g., early warning legislation) may accelerate state-level intervention, not only for districts that have a true deficit, but also for those teetering on the edge of insolvency. The lessons learned in the consolidation effort of Willow Run Community Schools and the Ypsilanti Public School District will help others who choose to move in this direction.

Secondly, the study informs future policy decisions related to consolidation and annexation in the State of Michigan. While the number of districts that have been consolidated or annexed has been relatively small over the last few decades, the legislature acted within the last two years to dissolve two deficit districts thereby unilaterally changing the landscape in those communities (Citizens Research Council, 2013). Because of an ongoing and cyclical interest in consolidation efforts—term limits ensure that every six years we have new elected officials who have “new ideas” including ways to reduce the number of school districts—the lessons learned in the Willow Run/Ypsilanti consolidation will serve to inform future policy decisions.

The study is arguably important for state legislatures considering consolidation legislation, including Mississippi, Vermont, Kansas, and Oklahoma. Rogers, Glesner, and Meyers (2014) concluded their findings in studying Vermont’s voluntary consolidation efforts by noting,

Continuing and future efforts would benefit from a broader base of knowledge concerning best practices for planning and implementing voluntary mergers, additional research on methods for developing community participation and support, and a deeper understanding of the critical role of schools in the connection between rural residents and their communities. (p. 12)

The study adds to the base of knowledge noted above even though the demographics differ from the typical focus on small and rural schools.

Limitations and Delimitations

The case study of the Willow Run and Ypsilanti consolidation cannot be used to definitively inform every future consolidation effort, given the specifics of each situation

differ and local context matters. The economic and demographic realities of the two districts studied here are significantly different from the majority of districts within the State of Michigan and of most consolidation discussions around the country where the emphasis is typically on smaller and rural districts. As Stake (2010) noted, “The purpose of qualitative research is usually not to reach general social science understandings but understandings about a particular situation. By understanding better the complexity of the situation, we should contribute to setting policy and professional practice” (p. 65). However, some of the underlying processes are likely transferable in spite of the demographic differences and specifics of this particular case. Additionally, because state policies and context differ significantly, many of the specific policy recommendations may be more applicable for Michigan than other states.

The focus of this study will be on the critical leadership decisions of the boards, superintendents, WISD, and policy-makers that were made during the process. The study excludes perceptions of teachers, support staff, parents, and community members. While the perceptions of these other stakeholders have value, the information gathered would inform different questions from those addressed in this study.

It is possible to conceptualize the consolidation effort in four distinct phases.

- Phase I begins with the initial conversation on June 15, 2011, when the Washtenaw Intermediate School District was invited to serve as a convener of a conversation with the two districts, and concludes with the successful consolidation vote and appointment of the new governing board (November 19, 2012).

- Phase II is represented as the transitional phase from the first meeting of the newly appointed board (November 26, 2012) through the launch of the new district on July 1, 2013.
- Phase III is the actual launch of the new district on July 1, 2013, and is bounded by the election of the new school board in November of 2014.
- Phase IV begins with the seating of the elected board in January 2015 and is currently open with respect to an ending date for analysis purposes which, arguably, should be at least three years in order to allow for measurable results of the new leadership.

Because the nature of a qualitative study requires a detailed descriptive analysis in order to capture the salient aspects in each phase, this study is limited to Phase I. The research addresses key questions relating to the factors that led to the consolidation vote, the process that was utilized in order to achieve 61% support in both communities, and the policy considerations that are deemed relevant from the perspective of the key leaders in the process. Although some of the policy recommendations span beyond Phase I, the specific descriptive analysis concludes with the appointment of the new governing board. While there are many important lessons that can be gleaned from the transitional year as well as the first year of the consolidated district, they fall outside the scope of this study.

Methodology

In studying the Willow Run and Ypsilanti consolidation effort, the powerful lessons learned have been captured in the voices of the participants who guided the effort. Their ability to understand the community context, convey information, engage stakeholders, and connect with deeply held community values, helps move past a simple retelling of a story

into a more nuanced understanding of why and how the merger materialized. A study of this sort falls within the qualitative research tradition, specifically a historical case study. Adams and Foster (2002) concluded their review of the consolidation literature by noting,

The lesson in this research literature for policy makers should be: assume nothing and analyze much when considering proposals for school or district reorganization.

Purported benefits of larger organizational units do not materialize automatically.

Context is important, and issues of efficiency, cost, student performance, educational climate, and community relations must be addressed. (p. 838)

This study heeded the advice of Adams and Foster by carefully analyzing the relevant factors resulting in conclusions with respect to lessons learned and policy implications. The guiding questions for the research were the following:

- What were the conditions (social, political, historical, community, and other) that led to the successful consolidation vote in 2012?
- What role did the Washtenaw Intermediate School District play and to what extent did the third party facilitation of the dialogue impact the final outcome?
- In what ways is consolidation a viable strategy for addressing struggling districts (deficit and academically underperforming) especially in urban environments?
- What process lessons were learned that may assist other districts contemplating consolidation?
- What leadership lessons does this case study hold for school officials, policymakers, and community officials?
- What policies supported or hindered the consolidation effort? What policy changes can be recommended as a result of the lessons learned in this consolidation?

In outlining the reasons for selecting a case study methodology, Merriam (1998) stated:

A case study design is employed to gain an in-depth understanding of the situation and meaning for those involved. The interest is in the process rather than outcomes, in context rather than a specific variable, in discovery rather than confirmation.

Insights gleaned from case studies can directly influence policy, practice, and future research. (p.19)

One of the defining features of the case study, according to Merriam (1998), is the bounded nature of the study. There are clear parameters of what constitutes the case. Compton-Lilly (2013) noted “exemplary case study researchers will successfully negotiate between two potentially conflicting aspects. The boundaries of their case will be clearly defined, while the case itself will be richly contextualized within multiple contexts (e.g., social, political, cultural, and institutional)” (p. 56). The boundaries of this case study included the two districts that merged, the community context, and the event/community vote that authorized the merger.

Interviews were conducted with key leaders in the consolidation process, including former State Superintendent Mike Flanagan; former superintendents Dr. Youseff (Joe) Yomtoob, Willow Run and Dr. James Hawkins, Ypsilanti; former Willow Run and Ypsilanti Community Schools superintendent Laura Lisiscki; state representatives David Rutledge and Bill Rogers; and school board presidents David Bates, Ypsilanti; Don Garrett Jr., Willow Run; and Gregory Peoples, Washtenaw Intermediate School District. Additional supporting documentation was secured to provide a more complete picture of the case and to support the themes and lessons learned that emerged from the interviews.

Researcher Bias

Because the researcher facilitated the initial conversations and then served as the inaugural superintendent of the new district, there is both a benefit and a risk related to the role of the researcher in the proposed study. In order to mitigate bias concerns in the findings, the data was triangulated using standard procedures for qualitative research. Additionally, two of the four members of the dissertation committee were observers during the consolidation process, and they were encouraged to provide a critical response to the findings to ensure they resonate with the observed experience without being unduly characterized in a favorable light by the researcher. At the same time, when considering leadership decisions such as the “how” and the “why” that are critical to bringing to light the lessons learned, the perspective of the researcher is unique and relevant and will be included in a careful and intentional manner. Creswell (2013) defined reflexivity, noting “the writer is conscious of the biases, values, and experiences that he or she brings to a qualitative research study” (p. 216). He noted two important parts of reflexivity in the process. The first is where the researcher addresses his or her experiences with the area being studied. The second is “to discuss how these past experiences shape the researcher’s interpretation of the phenomena” (p. 216). He pointed out that the second part is sometimes omitted from studies, and yet it is important in terms of identifying the ways in which these experiences may influence the findings and conclusions. Depending on one’s epistemological standpoint, the subjectivity that is inherent in qualitative research can be seen as a strength or a weakness. Roulston and Shelton (2015) provide a helpful review of how to conceptualize bias in qualitative research:

First, forms of “bias” (observation bias, selection bias, researcher bias, confirmation bias) may only be understood in relation to foundationalist assumptions about research. For researchers using what Lincoln et al. (2011) refer to as the “new-paradigm” approaches—which take in critical, constructivist, interpretive, participatory, and post-modern paradigms—bias is not necessarily equated with “error,” and the elimination of bias is not possible. (p. 337)

While there may be an objective reality associated with the consolidation process, a technically accurate recounting of the chronology of events as they unfolded, the real meaning behind the events and process is associated with the subjective experience and interpretive lens of those who engaged in the process. Rather than attempt to eliminate bias, Roulston and Shelton (2015) suggested that the questions can be reframed in order to establish whether the researcher has adequately revealed his or her own interests and if reflexivity is utilized in a manner consistent with good practice (p. 338).

The personal relationships this researcher formed over time with the interview participants, as well as with many others in the process, must be incorporated through the research design, implementation, and understanding of the findings and recommendations. To contemplate a similar study being done by a researcher who had no experience with the actors or the community may address possible concerns related to bias, but it would remain a subjective interpretation of the phenomena being observed nonetheless. The keys to ensuring the study unfolds in a valid and reliable way include using multiple sources of data, member checking, and explicitly identifying the ways in which the researcher contributed to and was engaged in the process. Creswell (2013) suggested that there are several ways to incorporate reflexivity in the research. These include at the beginning of the study, spread throughout the

primary sections, or even in an epilogue (p. 216). One important distinction from concerns related to the impact of the participant-observer approach is that the involvement of the researcher was independent of the historical review of the case itself. In other words, although this researcher was an actor in the case being studied, my research interest materialized subsequent to the events and, therefore, did not impact my role in the process as it unfolded. However, because of my participation in the process, it is imperative to ensure that my own view of the events is not given undue weight or influence compared to the views of the other leaders in the process. Accordingly, in areas where my specific knowledge as a result of being a facilitator of the process is necessary to include in the case study, that information has been included without separate notation. However, in areas where my judgment regarding what happened and lessons learned may concur or diverge from the other leaders in the process, I have identified that in a separate reflective epilogue.

Definition of Terms

Academic Achievement—primarily measured through standardized assessments, including the Michigan Educational Assessment Program (MEAP) test administered to students in grades 3–8 and grade 11, as well as the ACT assessment administered to all high school juniors.

Annexation—as defined by the Michigan Department of Education, “is when one district attaches another district to itself. In this case, the district to be attached loses its legal entity and becomes a part of the annexing district” (Michigan Department of Education, 2012).

While similar in form to the consolidation process, the primary difference is that the annexing district enlarges its boundaries while the annexed district ceases to exist as they are absorbed by the annexing district.

Appointed Board—subsequent to a successful consolidation election, the Intermediate School District (ISD) Board of Education is tasked with appointing a new board of education within ten days of the certification of the election. This appointed board replaces the prior boards for each of the consolidating districts through June 30 following the election. They continue as the board for the newly consolidated district until the next regularly scheduled election when the voters elect all seven members.

Consolidation—for the purposes of this study, relates to the complete merging of two independent school districts. While there are studies that address consolidation of buildings within a district, that falls outside the parameters of this review. The Michigan Department of Education’s definition is as follows: “School consolidation is a process used to merge two or more existing school districts into a new district. This process can be initiated by the affected boards or the school electors in each district, and it must be approved by the school voters in the affected districts” [MCL 380.851 to 380.871] (Michigan Department of Education, 2012).

Consolidation of services or shared services—represents an opportunity to realize efficiencies and economies of scale for school districts by sharing of services (e.g., transportation, business office support, technology, human resources) while avoiding the issues and challenges associated with full district consolidation or annexation.

Deficit District—According to the Michigan Department of Education website (2015) “a district is considered to have a deficit fund balance if it has adopted a deficit budget or incurred an operating deficit as evidenced by the following:

- 1) Its Total General Fund balance is negative, or projected to be negative at the end of the current fiscal year; or,

2) Other funds have negative fund balances or projected negative fund balances that are greater than the General Fund balance.”

Deficit Elimination Plan (DEP)—districts that are in deficit are required to submit a deficit elimination plan to the Michigan Department of Education for approval. Typically, these plans required the district to identify cost-cutting measures necessary to eliminate the deficit within a two-year window, although the state superintendent possesses the authority to extend the period of time allowed for deficit elimination.

Foundation Grant—when Proposal A took effect, each district was guaranteed a base amount of funding on a per pupil basis. This determination was tied to a formula that is not germane to the overall study, so it will not be addressed in detail here. There were also “hold harmless” districts that were permitted to levy local taxes to maintain their higher level of investment in education in their communities that was in place at the time Proposal A was enacted.

Involuntary consolidation—is a situation where districts are forced, typically by legislative action, into combining. Arkansas and Maine, for example, have enacted laws that mandate consolidation under certain conditions. In Michigan, the actions of the legislature that mirror an involuntary consolidation have been cases of legislated dissolution. Because of a deep historical commitment to local control, elected officials have been reticent to mandate or force consolidation and have opted for various incentives to encourage voluntary consolidation.

Persistently Low Achieving—under the No Child Left Behind Act (NCLB), states were required to identify school buildings that were performing in the bottom 5% of all schools on state assessments. NCLB prescribed certain interventions for buildings so designated. In

Michigan this included the potential that a building could be removed from the local school district and put under the authority of the State School Reform District while being operated by the Educational Achievement Authority.

Proposal A of 1994—major overhaul in how public education is funded in Michigan. Prior to Proposal A, local education entities relied on millages and property tax collection and were subject to the willingness and ability of the electorate to support the educational enterprise. With the approval of Proposal A, funding shifted from a locally-generated system to a state-operated system with the establishment of a foundation grant on a per pupil basis.

School of Choice—implemented in Michigan beginning in 1996, this policy opened the doors for students and families to attend a school district other than their district of residence.

Organization of the Document

The study is organized as follows: Chapter 2 includes a review of the literature including an analysis of current research related to voluntary and involuntary consolidation across the nation and in Michigan, consideration of research on economic efficiencies and academic opportunity—the two primary reasons given for supporting consolidation, and research related to consolidation of services. This review of the literature assists in situating the current case study in the larger context of the consolidation debate, as it continues in Michigan and across the nation. The chapter concludes with a review of a three-part conceptual frame to guide understanding of the phenomena being studied. Chapter 3 addresses the methodology selected for conducting the study and details the procedures used in order to identify lessons learned from key leaders in the process as well as policy considerations for the future.

Given the study is framed as a historical case study, the data collection and analysis led to separating key sub-phases into separate chapters. Chapter 4 includes a review of the historical background and context that provides critical information to understanding the backdrop of the overall consolidation conversations. Chapter 5 addresses the initial conversations from the first meeting in June of 2011 through the second joint board meeting where the two school boards approved resolutions to pursue full district consolidation contingent on developing a comprehensive plan for unification. Chapter 6 details the process from that second joint board meeting through the course of the summer as the community engaged in a process of envisioning a new unified district, which resulted in the vote of both boards to place the question of consolidation on the November 2012 ballot at a joint meeting in August. Chapter 7 addresses the campaign between August and November, including community conversations, policy advocacy, and the election results along with the process for appointing a new board following the successful vote.

Chapter 8 concludes with a final review of the key lessons learned as well as policy considerations and recommendations for future study. An epilogue containing reflections of the researcher on the process, separate from the study, is included, following the final chapter.

CHAPTER 2: REVIEW OF THE LITERATURE AND CONCEPTUAL FRAMEWORK

Few public policy issues touch the heart of a community more than the loss of the local public school through reorganization or consolidation of school districts.

—Ward and Rink (1992)

In an environment of scarce resources, declining student population, and increased accountability requirements, many states have revived efforts to implement voluntary and/or mandatory consolidation of school districts. There is a long history of school district consolidation in the United States. Between 1930 and 1980 more than 100,000 schools were consolidated into new districts across the nation (Strang, 1987). In the last few decades, the pace of consolidation has slowed dramatically. In Michigan, there have only been four district level consolidations in the past thirty plus years. However, as the state and nation plunged into economic recession early in the twenty first century, policymakers in states across the country once again turned their attention toward the issue of school district consolidation (Spradlin, Carson, Hess, & Plucker, 2010). Several states have new consolidation proposals under consideration, e.g., Vermont (Burnette II, 2016), Kansas (“Kansas school district realignment”, 2016), Oklahoma (Murphy, 2016), and Mississippi (Amy, 2016); and these are almost always contentious. From a policy and research perspective, consolidation has been promoted as a way to enhance economic efficiency as well as to increase educational opportunity for students (Nelson, 1985; Howley, Johnson, & Petrie, 2011).

Michigan was no exception to the trend toward revisiting consolidation of school districts. The administrations of Governors Granholm and Snyder provided financial incentives to encourage districts to consolidate voluntarily. Notwithstanding those incentives, only three mergers were voter approved since 2000. In two of those cases, the

combining districts still had a total enrollment of less than 1,000 students. The merger of Ypsilanti Public Schools and Willow Run Community Schools stands out as a unique case in Michigan and across the country. The student enrollment of the combined district exceeded 4,800 students. The district is classified as an urban district, situated in a once thriving community east of Ann Arbor. The loss of several large manufacturing facilities contributed to the economic decline of the area. Enrollment in both districts dropped significantly over the past decade, particularly with the expansion of charter schools and the introduction of School of Choice options for parents. Ultimately, each district fell into deficit. Most school consolidation research has focused on small and rural school districts, although there has been some study of the county/city mergers in Tennessee (Cox & Cox, 2010; County school districts, 2009). This case study was designed to surface the lessons learned during the consolidation process, particularly work leading to the affirmative vote of both communities to unify the two districts. In addition, the study also identified policy implications for future consideration.

It is important to situate the case study of the Willow Run Community Schools consolidation with Ypsilanti Public Schools within the larger context of consolidation efforts and research in order to understand why it warrants independent study. This review of the literature surveys the broad landscape of consolidation efforts and associated research. Given the two primary reasons for promoting consolidation are economic efficiency and increased educational opportunities, the literature review begins with consideration of research in those two areas with specific attention to emerging research, albeit somewhat limited, related to the impact of consolidation of districts on student achievement.

State policies establish important parameters for consolidation efforts. The second part of the literature review considers a number of state consolidation efforts and associated research. By looking at how various states approach consolidation—including mandatory versus voluntary, financial incentives, etc.—and comparing that with the policies in Michigan, it will be possible to identify areas that are common across states or that have been identified as important for the consolidation process. A growing number of case studies provide a more in-depth look at the process and impact of consolidation efforts. These will be reviewed in order to identify common themes related to both process and policy.

Finally, the Michigan context is covered in more detail given the state-specific policy parameters and longstanding local governance beliefs that have resulted in only four consolidations in the past thirty years. Ultimately, insight from prior research helps contextualize relevant factors in articulating the key lessons learned and providing policy recommendations for future consideration.

This chapter concludes by introducing a conceptual frame for approaching the study, highlighting three particular areas of focus: transformational leadership as outlined by Sashkin and Sashkin (2003), Kingdon's (2003) articulation of the role of policy entrepreneurs, and the Greek concept of *kairos* and its relevance to historical interpretation. These three concepts ground the study and support conclusions drawn from the data related to the research questions.

Economic Case for Consolidation

Given the economic arguments for consolidation which tend to be the dominating factor as elected officials pursue policies to reduce the number of administrative units, it is important to discuss the seminal research in this area. Virtually all credible studies on

economies of size connect in some way to the work over the past two decades of William Duncombe and John Yinger, along with their research colleagues.

Andrews, Duncombe, and Yinger (2002) set out to determine whether we are closer to reaching consensus with respect to the economic impact of consolidation. This study in the *Economics of Education Review* builds on the prior literature around consolidation, both of schools and districts, from an economy of scale perspective. The researchers look at the empirical studies since 1980 and unpack the various methodologies used to measure both production function and cost function analyses. While they point out relative strengths and weaknesses of the post-1980 studies, they identify some of the findings that have emerged that are important for future policy considerations. First, “Cost function results indicate potentially sizeable cost savings up to district enrollment levels between 2,000 and 4,000 students, and that sizeable diseconomies of size may begin to emerge for districts above 15,000 students” (p. 246). Secondly, “At the school level, production function studies provide some evidence that moderately sized elementary schools (300–500 students) and high schools (600–900 students) may optimally balance economies of size with the negative effects of larger schools” (p. 246).

One of the challenges with the various studies included in the literature review is the data used to determine cost function and production function in an education environment. While the authors attempted to suggest ways to account for the unique variables in an education environment, the results are still subject to criticism for what is not included (see Howley, Petrie, & Johnson, 2011). Andrews, Duncombe, and Yinger (2002) pointed out other variables that should be considered by districts contemplating consolidation, especially rural districts where transportation costs can consume much, if not all, of the savings (p.

255). They also noted that school size (production function studies) yield more consistent results than the district size studies which had more variability (p. 254). The authors also pointed out that few studies look at large central city schools, where large diseconomies are likely to exist based on statistical modeling, and they noted additional research is warranted in this area to determine if establishing smaller schools in these larger districts might address the negative achievement results associated with larger schools, particularly for students in poverty and children of color (p. 256). Finally, they suggested that now is the time for studies to look at actual consolidations over time:

...ultimately, consolidation is a policy change that should be evaluated using longitudinal methods. Carefully crafted evaluation of school and district consolidations is required to ascertain the actual impacts of consolidation on expenditures and student performance. Such evaluations would shift the focus of research from speculation about how the cost-size relationship could play out in consolidated schools to an examination of consolidation experiences themselves. (p. 256)

In a follow-up study, Duncombe and Yinger (2007) tackled the question of whether consolidation of districts actually cut costs. The study looked at rural school consolidation in the State of New York between 1985 and 1997. The results indicate that there are substantial cost savings (61.7% for two 300 student districts and 49.6% for two 1,500 student districts) for very small rural districts that consolidate. Some of these cost savings or economies of scale are offset by adjustment costs. When these are taken into account, the net savings shift to 31.5% and 14.4%, given the merger sizes noted above. Duncombe and Yinger concluded, "Overall, consolidation makes fiscal sense, particularly for very small districts, but states

should avoid subsidizing unwarranted capital projects” (p. 341). Because they were able to obtain data for the consolidated districts and compare that with a control group of similarly situated small rural districts that did not consolidate, this research has been oft cited as evidence of the financial benefit of consolidation, although not without critics (see Howley, Petrie, & Johnson, 2011). The researchers noted that “Although scholars do not agree on the cost impacts of consolidation, it is likely to remain on the education policy agenda in many states, particularly when school districts are under pressure to cut costs and raise student performance” (p. 342).

Duncombe and Yinger enumerated the financial incentives provided for voluntary consolidation in New York. There is a substantial increase (up to an additional 40%) in operating revenue for the first five years, and that amount is then phased out over the next nine years, a total of 14 years of supplemental funding. Additionally, the State of New York provides assistance related to capital expenditures. Because the state is involved in the consolidation process, including a feasibility study, the consolidation process often takes 2–3 years to achieve voter approval (Duncombe & Yinger, 2007). The study provides important information with respect to an economic incentive for consolidation. It noted that adjustment costs lower the net savings realized by consolidating very small districts and briefly touches on the issue of increased transportation costs. However, in the final analysis, the researchers suggested the data for small rural schools in New York supports state incentives for consolidation.

In an article for the *School Administrator*, Duncombe and Yinger (2010) expanded on their review of the literature and research and noted four important policy considerations based on the research. The first is that there are significant savings for consolidation of small

districts under 1,500 students. Secondly, there are other costs associated with consolidation noted in the research, specifically the impact on housing values; and these effects should be considered when establishing policy. A third implication is that states should rethink their consolidation incentive strategies in order to ensure the incentives do not exceed the potential cost savings that result from the consolidations. Finally, they noted that some states provide conflicting incentives relating to financial aid to small and sparsely populated districts, creating a disincentive to consider consolidation when in fact it may be financially beneficial using an efficiency metric. Another important qualifier is that while there are potentially large savings for the smaller districts that merge, these do not translate into large savings for states primarily because the overall cost associated with the smaller districts is a relatively minor portion of the total education expenditures.

In contrast to the findings and recommendations above, Howley, Johnson, and Petrie (2011) concluded that most of the savings from consolidation have already been realized through prior consolidations and that state-level policies mandating or encouraging additional school and district consolidation typically will not yield cost savings or better educational outcomes. They recommended that states consider policies that support shared services, expanded role of educational services agencies, and even deconsolidation in cases where district size results in bureaucratic inefficiencies. They also suggested that policymakers should avoid establishment of artificial size structures given they do not allow for the unique local context. Additionally, the researchers noted that notwithstanding the generally sound approach from an econometrics stand point, the studies related to the economic benefit of consolidation fail to take into account some of the other perceived benefits of smaller schools, such as co- and extracurricular participation, parent engagement, and other factors.

They suggested that the benefits of small schools cannot always be captured in a simple economic calculus and that policy considerations should include these important, although not as easily quantified, variables.

Educational Benefits of Consolidation

The second primary reason for supporting consolidation relates to increased educational opportunities (Nelson, 1985). This argument has often been put forward as it relates to the inability of small and rural schools to offer a full compliment of educational choices. Self (2001) provided an example of such a consolidation. Although the literature does not typically call out annexation as distinct from consolidation, the study by Self is described as a consolidation, but it meets the definition of an annexation in the Michigan context. The study, primarily survey data, was conducted by the individual who was the superintendent of a small school district in Ohio with 287 students that consolidated with a neighboring district. The purpose of the study was to determine the impact of the consolidation eight years after it took effect. There were five key reasons to support the consolidation that were given to the smaller district's community: low enrollment, finances, adequate curricular and extra-curricular offerings, people's attitudes, and academics. The author noted the greatest benefit of the consolidation was at the secondary level where students from the former smaller district experienced more educational and extra-curricular opportunities. Taxpayers also received a benefit of reduced taxes in the smaller district. The larger district taxpayers saw a slight increase in taxes, but overall the district remained stable during the transition. Teachers indicated better professional development opportunities as a result of working in a larger school system. The findings supported the educational benefit of the consolidation.

Karen Ballin (2007) studied the consolidation effort that resulted in establishment of the River Ridge School District in Wisconsin. This is a unique case study, not because of the small rural demographics, or the rival status of the two districts (Bloomington and West Grant), but because in 1958 the two communities voted to consolidate but could not reach consensus on building a new high school, so the merger dissolved. In 1995, the two communities came back together again, and this time the consolidation was successful. The study considered factors districts should consider when determining whether consolidation is a viable option (p. 2). In the interviews with participants in the process, Ballin noted that more educational options were available for students after the consolidation than before (p. 101). Other benefits of the consolidation were identified, including more efficient instructional delivery (p. 91) and use of facilities (p. 96).

Two more recent studies considered the question of whether consolidation has an impact on student achievement, an important distinction compared to simply creating additional educational opportunities. Gilliland (2008) studied the effects of consolidation in the following areas: student discipline, student achievement, expenditures per pupil, transportation costs, curriculum, extra-curricular and co-curricular participation, and leadership. The study was a mixed-methods design. The quantitative data included 60 districts that consolidated since 1990 in the State of Illinois. Smaller samples were selected for the qualitative aspects of the study.

Gilliland found a statistically significant shift in pre- and post-consolidation data in the following areas: student discipline (more focus on discipline policies and an uptick in disciplinary incidents), academic achievement (he only looked at grade 8 math and reading scores on the state test, but both improved following consolidation), and transportation costs

increased (consistent with most other research on consolidation). Gilliland specifically noted that there is very little data related to the impact of consolidation on achievement, while there are many studies that consider the economic impact as well as those (albeit indeterminate) regarding school and district size and achievement. As with many other states, nineteen of the most recent twenty consolidation efforts in Illinois at the time of the study enrolled less than 1,000 students when combined (p. 25). The findings related to improved achievement on a standardized test represent an important contribution to the study of consolidations; yet, it falls short of providing meaningful answers to the question of why the test scores improved. The author posited possible explanations, but further research is required in order to determine the actual explanatory variables given consolidation, in and of itself, is not likely to produce improved academic results.

Janet Balcom's (2013) dissertation *Leadership in school district consolidation and the impact on student outcomes*, studied a merger of three elementary school districts and one high school district to create the Twin River Unified School District (TRUSD). Balcom noted, "The focus of the consolidation was not based primarily on fiscal impact but on creating a unified district to better serve the students of the community" (p. 2). The combined district served a diverse student population of about 27,000. Enrollment declines prior to the merger were noted as were academic challenges. The researcher was a cabinet level participant during the consolidation effort and was working in the new unified district during the time the study was completed. She employed a mixed-methods approach to answering the question of whether the consolidation led to improved academic outcomes. The study considered pre- and post-data and was conducted four years following the merger. The researcher also considered the role of leadership through organizational change.

The findings in this study are encouraging when considered in light of the Gilliland research related to improved achievement. The major findings include the following: high school achievement dropped in the first year following consolidation and then began a steady upward increase in subsequent years, middle school achievement results were better every year following consolidation, and elementary test scores improved initially but saw a subsequent decline in the final two years studied. However, the author noted that the scores remained above the pre-consolidation levels. The benefit of this study also includes a reflection on the specific leadership approach to the consolidation that may help explain improved academic outcomes—namely, building reconfiguration, curriculum alignment, focus on data, and revised discipline policies and practices which resulted in reductions in suspensions and expulsions in the unified district. Balcom noted, “Trust, transparency, and communication were critical aspects in leading change to create a high functioning district” (p. 6). The leadership for change documented in the study includes an emphasis on being able to see the big picture as well as the importance of “systems thinking” (p. 8). While the district experienced declining enrollment in the first two years following the merger, enrollment increases were noted in the following two years, although still below pre-consolidation levels. While only a limited number of studies have considered the impact of consolidation on student achievement, there is some evidence that positive results are possible in areas other than finances. However, these results are not guaranteed and additional studies are needed to confirm the findings of Gilliland and Balcom and surface the germane aspects of the consolidation that explains the reason for the improved achievement results. While consolidation of districts may yield certain economic benefits and educational opportunities, those results do not accrue simply as a result of consolidating. The decisions

made by governing boards and district leadership contribute in significant ways to whether the intended benefits materialize.

Consolidation of Services

Given the politically charged nature of full consolidation, many people have suggested that an alternative is the sharing or consolidation of services (Plucker et.al., 2007; Shakrani, 2010; Arsen, 2011; Eggers, Snell, Wavra, & Moore, 2005). The report by Deloitte and Reardon (Eggers, Snell, Wavra, & Moore, 2005) titled *Driving More Money Into the Classroom: The Promise of Shared Services* concluded that there was a possible savings of \$9 billion across the country if districts took advantage of the economies of scale through shared services. They suggested that it is a preferred alternative to consolidation of districts with the associated political problems and loss of local control. Unfortunately, the report relies on limited examples and then extrapolates from those examples to create a national narrative without an associated research base that justifies the premise. In order to determine whether shared services result in the cost savings as postulated by Eggers, Snell, Wavra, and Moore (2005), it is important to study places that have implemented shared services. One such study was completed in Michigan in 2013 by Thomas DeLuca (2013) titled *K-12 Non-Instructional Service Consolidation: Spending Changes and Scale Economies*.

This is an important study since it represents one of the first empirical studies of the impact of service consolidation, and it happens to be of service consolidation at the Intermediate School District level in Michigan. DeLuca outlined the continued policy conversations related to consolidation of districts, noting that consolidation of service tends to be more palatable politically than full consolidation. He offered a definition of service consolidation as “service consolidation describes the transfer of responsibility for individual

services from the local district to another entity” (p. 152). Three research questions guided the study: (1) To what extent are local school districts in Michigan consolidating the provision of non-instructional services to the ISD? (2) To what extent does service consolidation affect service-specific expenditures? (3) To what extent does service consolidation affect instructional expenditures? These are timely and appropriate questions given the continued policy emphasis around consolidation of services and of districts. It is especially important given the lack of empirical research regarding whether consolidation of services achieves the desired results.

Like many other researchers, DeLuca (2013) built on the foundation established by Duncombe and Yinger. ISD business managers were surveyed with an 82.5% response rate, representing 80.2% of the local education agencies in the state. The results were representative of the overall state based on four categories: urbanicity, district enrollment size, student racial and ethnic composition, and student socio-economic status. The survey of business managers provided unique insight that could not be obtained through any other existing data set. The data analysis portion of the research covered the period from 2004 to 2010. The three areas with the greatest concentration of shared services were payroll, transportation (primarily special education transportation), and technology. DeLuca noted that there was some deconsolidation of services over the time period that was studied, representing about 2.7% of all shared services in the study; however, the reasons for the deconsolidation were not pursued. He emphasized, “Policy makers and advocates for service consolidation suggest that reduced spending while maintaining consistent quality is the expected outcome of service consolidation” (p. 159). A snapshot comparison of the cost per student for business office, operations and maintenance, transportation, human resources, and

technology between districts who had consolidated these services in 2010 and those that had not, provides initial support for the idea that cost savings through consolidation of services is a viable strategy. However, DeLuca noted that this analysis may fail to detect other factors that may influence district spending. In order to control for those, he conducted a series of regression models with differing controls in order to increase confidence in his findings.

With respect to service spending, DeLuca found that service consolidation reduces spending in three of the five areas (business office services, operations and maintenance, and transportation). However, none of the relationships were significant. He noted “As a result, factors other than service consolidation, such as student enrollment and per pupil revenue, appear much more likely to have a statistically significant influence on per pupil spending than service consolidation” (p. 164). These findings led to the next review, namely, whether any savings from consolidation of services resulted in increases in instructional spending. With the exception of business office service consolidation, which was significant, none of the other consolidation of services studied resulted in increasing instructional expenditures at a statistically significant level. DeLuca concluded, “Policies that mandate the consolidation of all non-instructional services expecting to significantly reduce service expenditures do so with no empirical support” (p. 167). He provided policy recommendations as well as suggestions for future research studies in this area. The study is a good reminder that what some may see as “common sense” public policy still warrants investigation to determine whether or not the expectation aligns with reality. As with so many other studies, local context matters; and DeLuca encourages policies that allow for flexibility and responsiveness to the realities in various parts of the state.

National Conversation

Across the country, numerous states continue to promulgate legislation designed to incentivize or, in some cases, mandate consolidation of districts. Although there have been some recent empirical studies related to the impact and effectiveness of consolidation efforts, the drumbeat for consolidation of districts is driven in large part by the perception that it will save money or increase educational opportunities. Spradlin et al. (2010) stated, “In the current economic climate it is increasingly important for all levels of government to maximize efficiency and minimize costs wherever possible to prevent further service reductions or the necessity for a tax increase” (p. 1). This sentiment appears to underlie much of the policy development across the nation. State legislatures continue to introduce new proposals to promote consolidation (Spradlin et al., 2010). Because one of the objectives of my study was to inform future policy considerations in Michigan, it is useful to understand the approaches taken by other states and the evidence of success, failure, and lessons learned that have been illuminated in various research efforts.

Several states that have enacted consolidation policies in the past fifteen years are highlighted below, noting research findings that inform the study of the Willow Run and Ypsilanti merger. Two states, Maine and Arkansas, adopted legislation that mandated consolidation. Given the infrequency of involuntary consolidation, we will turn our attention to these state specific strategies first.

Maine

Fairman and Donis-Keller (2012) conducted a multi-site case study to ascertain the lessons learned and policy implications of the mandated consolidation law in Maine that was adopted in 2007. The stated purpose of the consolidation law was to improve educational opportunities and equity for Maine students, reduce the cost of providing education, and

increase efficiency in education delivery. The overall goal was to reduce the number of districts in the state from 290 to 80. The study focused on the first two years of the implementation of the law while noting that subsequent to its initial approval, there were several unsuccessful attempts to repeal the law and other successful efforts to amend it. Like Michigan, Maine is a “local control” state, resulting in significant opposition to the law as approved.

The legislation required regional planning committees to develop a reorganization plan within one year. This timeline proved problematic, so one of the early amendments to the bill (given efforts to repeal the law failed) was to extend the timeline for compliance by an additional year. The study outlines the Maine context while also identifying key factors that are relevant for policymakers in other states. One area that stands out as the primary driver for elected officials was reducing the cost of education, or at least disrupting the seemingly constant increase in the cost of public education. The researchers noted that the economic imperative was not particularly compelling for the communities they studied. Those communities were more interested in the potential educational benefits or lack thereof as regional planning committees discussed possible reorganization. There was a significant backlash in response to the mandate and penalties associated with failure to comply. The research participants indicated a desire for incentives and a voluntary process, although some also noted that without the mandate the restructuring that occurred would not have happened. From a process perspective, some of the key learnings included the importance of establishing a reasonable time frame, an understanding that this is messy and hard work that requires a significant amount of time, leadership matters, and use of a trained and trusted facilitator can help overcome challenges and keep the process on track. From a policy

perspective, the researchers indicated that the purpose of the law and its intended outcome needs to be clearly articulated and that communication at the state and local level regarding the policy and its rationale are critical. They noted that fiscal incentives are helpful but not necessarily sufficient to motivate consolidation, and they acknowledged that penalties can be a powerful motivator to encourage consolidation but also may backfire. Finally, they concluded that policymakers should avoid a one-size fits all approach (p. 38).

A follow-up study was completed by Donis-Keller, O'Hara-Miklavic, and Fairman (2013) looking into what kind of impact Maine's forced consolidation effort had on educational opportunity and equity. This study, also configured as a multi-site case study, reviewed the 24 regional school units (RSU) and alternative organizational structure (AOS). The lens through which the study was conducted was educational opportunity and equity. The researchers were seeking to determine the answer to three questions: (1) What changes in educational programs and opportunities resulted from the consolidation? (2) How did the newly formed districts pursue equity? and (3) What were the challenges and supports for the consolidation efforts? The data were collected at the beginning of the second year of the mergers. Accordingly, the results are noted as preliminary since many districts were taking a more deliberate timeline toward making changes. Overall, "Three-quarters of the districts noted improved educational opportunities linked to consolidation" (p. 45). The research results led to identification of seven primary strategies that were used by the consolidated districts to address inequities. These included taking stock of existing offerings; establishing district level structures to address programming concerns and to set priorities; aligning technology; expanding offerings, curriculum, and programs; enhancing professional development; increasing the use of data to inform decisions; and reconfiguring schools and

grades to address equity concerns (p. 46). Many of the districts employed one or more strategies to bring together divergent education programs. The researchers also identified challenges and supports that were perceived as significant. These included the challenges of limited financial resources, workload and time constraints, resource allocation, fears of the smaller partners of being overshadowed by the larger partners in the mergers, differences in educational programs, and differences in teacher contracts. Supports were generally divided into two categories: those that focused on the structural/organizational aspects of the work and those that addressed equity and quality in the system. One of the supports that was singled out was the value of an impartial external facilitator. They also noted the importance of intentional culture building during the transition. Finally, leadership was identified as a key element. Many of the themes that emerged from this study are consistent with the planning/transition work for Ypsilanti Community Schools and to some extent the first year of operation of the new unified district.

Arkansas

In Arkansas, Public Act 60 was approved in 2004. The law mandated reorganization for districts whose enrollment fell below 350 students (University of Arkansas Policy Brief, 2010). This reorganization can be voluntary consolidation or annexation, or involuntary in cases where districts fail to take action to comply with the law. As a result, between 2004 and 2010, there were 68 fewer school districts than prior to the law's implementation. Interestingly, following a key lawsuit and a change in administration, small districts are now permitted to apply for a waiver to avoid mandatory reorganization (Encyclopedia of Arkansas History & Culture, 2015).

There are two empirical studies connected to the Arkansas consolidation conversation that are important. The first was an economic analysis completed by Dodson and Garrett (2004). This study was conducted using data from 1999 in Arkansas from 287 out of the 310 total districts. The largest districts, with enrollment greater than 10,000, were omitted as were eighteen districts for which there was incomplete data. The researchers employed a similar methodology to that used by Duncombe and Yinger.

They found that there are significant economies of scale that are achievable through district consolidation in the State of Arkansas. The minimum efficient scale is achieved for overall cost with an enrollment of 3,500, for teacher salary cost at 1,850 students, and for supply cost at 525 students (p. 275). One of the interesting findings was that transportation costs do not represent an economy or diseconomy related to size, with the exception of a rough range of about 500–1,000 students. The authors noted that while there may not be a difference in cost per pupil for transportation, there may be a “cost” associated with longer travel times (p. 278). Dodson and Garrett concluded, “The empirical findings reveal that significant scale economies exist across Arkansas school districts. Although these results are interesting from a purely economic perspective, they have strong policy implications for many states currently considering school district consolidation” (p. 276). The researchers posited that if Arkansas were to move forward with consolidation, up to \$40 million could be saved annually, based on the modeling of consolidating four rural school districts into one county-based district, but they also note, “The magnitude of scale economies for Arkansas differs from that found in previous studies, highlighting the importance of analyzing each state separately to allow effective policy regarding school district consolidation” (p. 279).

Although the researchers included ACT scores as academic measures, the metric is somewhat limiting with respect to determining the extent to which the potential cost savings due to economy of scale impacts student outcomes. Additionally, while the researchers included other demographic indicators, they did not include those in any of the findings with respect to whether there were any important differences. They also failed to include subcategories for students of color and English Language Learners.

The other study in Arkansas was a phenomenological review of four consolidation/annexation experiences that were the outgrowth of the requirements of Public Act 60 (Nitta, Holley, & Wrobel, 2010). The researchers studied the impact of consolidation in four Arkansas high schools from the perspective of teachers and students. Two of the mergers were consolidations, and two were annexations. The annexation situation included one voluntary and one forced annexation. The forced annexation was due to poor academic performance. The mergers were voluntary, although one was noted to be on the verge of falling below the enrollment threshold and the district decided to be proactive rather than wait for a state mandate. Two general themes emerged: students navigated the disruption better than the teachers and both students and teachers identified benefits to the consolidation. Students in particular noted broader course offerings and social opportunities. Some possible participants declined to participate in the study, leading to speculation by the authors that the experiences in those mergers might have been less positive than those who agreed to participate in the study.

The research coming out of Maine and Arkansas is helpful in that it suggests there are certain parameters that accomplish one or both of the primary objectives—efficiency or enhanced educational opportunities—given for pursuing consolidation. At the same time, it

is apparent that involuntary consolidation presents unique challenges and may not be a sustainable policy over time. Given most states have adopted voluntary consolidation incentives, a few recent examples will be reviewed.

Vermont

Three years after Maine adopted a law mandating consolidations for districts under 2,500, the Vermont legislature adopted legislation (Public Act 153 of 2010) designed to encourage voluntary consolidation. The number of districts in the state at the time the legislation was approved was very close to the number of districts in 1882. The structure of public education in Vermont is unique in that there are 298 school districts, but they are governed by 46 supervisory units (SU). Only seven districts have more than 1,500 students.

The impact of the consolidation efforts was studied by Rogers, Glesner, and Meyers (2014). The Vermont legislation included a number of incentives designed to encourage voluntary consolidation. These included a temporary reduction in property taxes; facilitation grants of up to \$150,000; and up to \$20,000 for the study committee, legal cost, and consultant fees. While there was a mandate for SUs to consider voluntary mergers, only twelve completed a full study. There were six merger votes and only two were successful, and those two were interconnected. The study was broken into three parts: a survey of SU superintendents regarding the legislation and conversations with their boards, exit polling at the site of the second merger vote since the first vote took place before the study team was established, and interviews of the leadership in the successful mergers. The findings provide useful information in terms of public opposition to mergers, connected in large part to the historical “local control” structure of Vermont politics. Although the intent of the legislature was to improve educational opportunities and reduce cost, those did not appear to outweigh

the concerns in most areas of the state related to loss of local control and identity. Additionally, with respect to the successful mergers, the researchers noted that the communities had a history of working together so that groundwork was already in place, making the decision less threatening. Notwithstanding the review of the successful consolidations, the researchers concluded, based on their findings, that the efforts to encourage voluntary consolidation is not likely to materialize as hoped by the legislature.

Indiana

Moving closer to Michigan, the State of Indiana has been wrestling with the idea of school consolidation over the past decade as well. In the literature, while the legislature raised the question and provided funding for feasibility studies, there has been very little movement toward actual consolidation. In fact, the focus has landed more squarely on consolidation of services with a recognition that “local control” issues often trump other benefits of consolidation (Plucker, Spradlin, Magaro, Chien, & Zapf, 2007). In their review of the policy environment, Plucker et al. (2007) surveyed various literature and the support for and against consolidation, collaboration, and shared services. They emphasized the point that the research does not show improved academic outcomes following consolidation. This point is refuted, albeit only one instance, by the study of the Twin Rivers Unified District (Balcom, 2013) where she found improved academic outcomes four years following the consolidation of three elementary and one high school district into a unified system. The Plucker et al. (2007) report also includes a case study of the Tippecanoe consolidation review (three school corporations) by Boyd and Ulm (2006) where, in spite of the various benefits including increased funding per student, “the three school districts determined that ‘the increase in funding did not offset the loss of local control they felt would accompany

consolidation” (p. 9). The issue of local control and local identity as a barrier to consolidation efforts surfaces throughout the literature. However, the continued legislative interest in Indiana resulted in a follow-up report by Spradlin, Carson, Hess, and Plucker (2010).

This review by the Center for Evaluation and Education Policy builds on the consolidation report issued in 2007 with additional analysis regarding developments across the country as well as within the State of Indiana. Indiana provided funding for consolidation feasibility studies of \$100,000 per year in grants of up to \$25,000 each over a two-year period 2007–08 and 2008–09. Eight studies were completed, and the authors noted that “none of the studies recommended consolidating schools in the near future without further analysis” (p. 6). However, the feasibility study with Randolph Central, Randolph Eastern, Randolph Southern, and Union did advocate consolidating the four into one school corporation in three to five years. The study also noted that the two smallest districts were moving forward with plans to consolidate (p. 8). Most of the feasibility studies ended up recommending various ways in which to collaborate and consolidate in the service delivery area without actually consolidating the districts.

The authors compare data with respect to participation in AP exams based on district size, proficiency on the I-STEP test, and student instructional expenditures. Because the analysis infrequently controlled for important variables such as poverty and other demographic characteristics, it is difficult to assert that the information is reliable and useable to inform future policy considerations. Similar to other studies, Coulson, 2007; Duncombe and Yinger, 2010; Spradlin et al. (2010) pointed out that consolidating really small districts

represents a very small percentage of overall student enrollment and also a relatively small amount of savings related to education expenditures in the state.

Zimmer, DeBoer, and Hirth (2009) conducted an empirical study looking at economies of scale in Indiana by analyzing data from 2004–2006 for 292 school districts. The study relies on the same methodology used by Duncombe and Yinger and it employs a “direct and inflexible method of cost estimation” (p. 105). As with all studies of this type, the control of variables is key to determining whether the results are reliable. Unlike the Coulson 2007 study, there was no attempt to differentiate expenditures related to federal funds for IDEA or Title I for example. The results of the study are summarized below.

The optimal enrollment to maximize efficiency on a cost per pupil basis is 1,942 students. At the 95% confidence level, this results in a range of 1,300–2,903. This range is less than Andrews, Duncombe, and Yinger’s (2002) 2,000–4,000 or Coulson’s (2007) optimal size of 2,900. The researchers claim, “It can be said with confidence that any cost benefits of consolidation quickly dissipate beyond 2,000 students and diseconomies emerge” (p. 112). One of the surprising findings is that the transportation variable does not explain the rise in diseconomies, although this is consistent with the findings of Dodson and Garrett (2004).

Zimmer, DeBoer, and Hirth (2009) indicated that teacher salaries rise initially but begin to decline beyond 4,000 students. However, “The benefits of consolidation through scale economies for per pupil administrative salary costs extend to an enrollment level of approximately 3,000 students. Beyond roughly 3,000 students, per pupil administrative salary costs exhibit signs of scale diseconomies and become a liability for further consolidation” (p. 116).

Zimmer, DeBoer, and Hirth (2009) also noted the negative effective of size on attendance which is consistent with other research (Cotton, 1996). Unlike Coulson (2007), the researchers were unwilling to assert that large districts should be deconsolidated given the knowledge of the cost curve at the upper level of enrollment, which was greater than 20,000 was untested. The researchers concluded that there are many opportunities for more efficient structuring of districts within Indiana, but they are not insensitive to the other political, social, and geographic variables that also come into consideration.

Although somewhat older, the case study by Ward and Rink (1992) produced valuable insight related to reasons why communities oppose consolidation efforts. It is important related to the current study in a number of ways. First, the results affirmed reasons in support of consolidation related to curriculum, fiscal efficiency, and increased teacher salaries (p. 15). Reasons for opposing consolidation included concerns about associating with those from neighboring districts—something that was deemed to be a “moral and cultural disaster” (p. 15). Additionally, they noted, “The theme of loss throughout the consolidation resistance does not focus so much on loss of local control as it does on loss of identity” (p. 15). This is an important finding and while much of the more recent literature returns to the language of local control, it appears to be the loss of identity that underlies a fair amount of the concern. Ward and Rink also pointed out that local control is complex and has multiple meanings. These included not only localism, but also “fears of others and their values.” Additionally, others define local control as key to preservation of “participatory democracy,” but the authors also note that it can “be a euphemistic stalling device to maintain and prolong exclusionary policies and discrimination against certain groups” (p. 18). As consolidation conversations continue, it is important to encourage policy-makers to

understand the complexities behind traditions of local control if they hope to advance successful consolidation efforts.

In reviewing the literature, a few other important observations are worth highlighting. The existing research base, in terms of empirical studies on consolidation of districts, is primarily in other states, not Michigan. Outside of the policy papers by MSU professors Ballard, Shakrani, and Arsen, the only other recent study was conducted by Coulson (2007). While the research from across the country can provide valuable information, it lacks the policy and financial context of Michigan that distinguishes our experiences in important ways.

The Michigan Context

The policy and historical landscape in Michigan provide an important framing for understanding and properly situating the Ypsilanti/Willow Run Consolidation effort. Since 1983 there have been four district consolidations in the State of Michigan (Citizens Research Council, 1990; D. Hanrahan, personal communication, August 3, 2015). Two of these occurred in the Upper Peninsula. Mathiasa Twp and Rock River Limestone consolidated in 1987 and became Superior Central; Marenisco and Wakefield consolidated in 2004 and became the Wakefield/Marenisco District. The other two were in southeast Michigan. Britton-Macon and Deerfield merged in 2009 and became the Britton Deerfield School District, and Willow Run and Ypsilanti Public consolidated in 2013 and became Ypsilanti Community Schools. Three of the consolidations were small rural districts that combined with a resultant student population of less than 1,000 in each case. In fact, these consolidation efforts tend to fall in line with the previous studies with respect to districts that are likely subjects of consolidation—and also ones that were likely to realize economies of

size (Duncome & Yinger, 2007). Only the Ypsilanti and Willow Run merger resulted in a larger student population of approximately 4,800 students. It is also a unique case in that it is the only consolidated district in Michigan where the two former districts were both in deficit.

The Citizen's Research Council review of *School District Organization in Michigan* (1990) included information reflecting the consolidation and annexation proposals that were approved and/or rejected from 1981–1990. In that period, nine consolidation proposals were considered by voters in various communities, but only one—Wakefield-Marenisco—was approved. They noted that voters in Perry and Morrice twice considered and rejected consolidation during that decade. Interestingly, the issue was placed in front of voters in those two communities again in 2008 and again rejected. The Michigan Department of Education has tracked all successful annexations and consolidations since 1983, but they did not track proposals that were considered and rejected since 1990. Given the relative infrequency of consolidations, coupled with the ratio of approval/disapprovals in the 1981–1990 time frame, there is a question about what the context was in the communities that approved consolidation, and thus the need for the current study.

There are a number of financial and policy decisions in the State of Michigan over the course of the past twenty years that significantly impacted the context in which consolidation conversations occur. First, while Michigan has a deeply held commitment to local control, the power of the purse shifted from local communities to the state with the passage of Proposal A in 1994. Now, districts are dependent on the state for the majority of their funding, and they are generally prohibited from pursuing local levies. The exceptions are hold harmless districts and ISD-wide enhancement millages. Prior to Proposal A, districts relied heavily on property tax. While this created a disparate burden on communities with

low property valuations, it provided a relatively stable source of revenue irrespective of changes in student enrollment. Proposal A ushered in significant changes in how schools received their funds and student enrollment took on new significance. Districts were awarded funding in a foundation grant on a per pupil basis tied to two specific count days, (occurring in October and in February). Coupled with School of Choice policies, districts could see significant shifts in funding as a result of student migration patterns, either through relocation, choice, or a lower birth-rate.

The Citizen's Research Council authored a report, *Managing School District Finances in an Era of Declining Enrollment* (January 2015), that does a nice job of unpacking the intended and unintended consequences of the demographic shifts such as fewer school-aged students combined with the proliferation of charters and school choice. Importantly, they noted that districts are challenged in making reductions because the incremental cost/revenue does not neatly fall along per pupil expenditure lines. For example, if a district loses 30 students, it typically is not all from the same grade or building and, therefore, reducing expenditures is not as simple as laying off a teacher, which also includes an expense. The importance of this analysis for the consolidation policy conversation, especially the Willow Run and Ypsilanti merger, is that declining enrollment, increased number of charter schools, and school of choice expansion converged to accelerate the economic challenges faced by the two districts. While it can be argued that student achievement concerns were the reason why many parents opted for charters or other public schools, it is clear that the state-level policies created conditions that contributed to the financial challenges.

In a study of the consolidation of two small rural districts in Wisconsin, Ballin (2007) identified similar challenges related to the way in which school districts are funded. In particular, she called out the era of competition, reliance on a per pupil amount established by the state, coupled with a limited amount of local tax levy that resulted in severe financial strain on small rural districts in the state. These conditions suggest that one of the major policy concerns relates to how state-level funding decisions impact financial viability of school districts. Although the Ballin study considered the impact on small and rural school districts, the case study of Willow Run and Ypsilanti illustrated a similar impact on impoverished urban communities as well.

At the time Willow Run and Ypsilanti initiated their conversations, Michigan law provided for the appointment of an emergency financial manager, under the auspices of PA 72 of 1990, who would have control over financial decisions in a local school district. This law was modified in March of 2012 (Public Act 4) to provide even more authority for an emergency manager. Because of the length and severity of the deficits in both districts, there was a legitimate concern that the publicly elected boards would lose decision-making authority and by extension, that the community would lose local control.

Another relevant policy in Michigan was the legislation approved in 2013 that provided for the dissolution of certain deficit districts with student enrollment less than 2,400. In the case of Buena Vista and Inkster in 2013, the legislature decided that the combination of long-term deficit spending and poor academic performance warranted an involuntary dissolving of the two school districts. Representative Rogers, former chair of the K-12 School Aid Appropriations Committee and author of the dissolution language, referred to this as the “nuclear” option, since it was a solution imposed on both of those communities.

Additionally, the decision of where to send the students to school (neighboring districts) and how to allocate the physical assets of the dissolved districts was a matter for the Intermediate School District boards in both cases to decide. Because both school districts carried a substantial amount of operational debt, the local communities were still required to authorize collection of the 18 non-homestead mills for the purpose of retiring that debt. According to Representative Rogers (personal conversation), the hope was that other struggling districts would see the impact of dissolution and decide to take a more proactive approach similar to the Willow Run and Ypsilanti Consolidation effort. In a conversation with the current Wayne RESA superintendent, he noted that the Inkster community is still reeling from the impact of the involuntary closure of their schools (personal communication, September 24, 2015).

At the time of the Willow Run and Ypsilanti consolidation conversations, the legislature approved \$10 million to support consolidation, both of services and districts. However, none of the funding was available prior to the consolidation vote. Unlike other states where feasibility studies were funded through state appropriations, the Washtenaw Intermediate School District along with Ypsilanti and Willow Run funded the initial efforts, including securing funding support from area groups including the United Way, the Ann Arbor Area Community Foundation, and the Eastern Leaders Group. One of the interesting findings that emerges from a review of the literature is that many other states provide resources for districts to conduct a pre-consolidation feasibility study, typically facilitated by a third party. These states include New York, Wisconsin, Maine, Vermont, and Indiana (Chabe, 2011; Ballin, 2010; Rogers, Glesner, & Meyers, 2014; Fairman & Donis-Keller, 2012; Spradlin, Carson, Hess & Plucker, 2010).

The drumbeat for more consolidation continues in Michigan. Senator Knezek introduced Senate Bill 447 in 2015 that would modify the funding formula for consolidated or annexed districts to create a greater incentive. The introduction of the bill was spurred by his desire to see South Redford and Redford Union merge (Jachman, 2015). The chairs of the House and Senate K-12 appropriations committee, Senator Hansen and Representative Kelly, have expressed a desire to pursue consolidation incentives, and they continue to allocate funding designated to support these efforts.

Over the past five years, the Educational Policy Center at MSU has published several papers on the topic of school consolidation. In 2010, Professor Ballard authored a paper titled *Reflections on School District Consolidation*. In this reflection, Ballard reviewed many of the issues related to consolidation, including the history of consolidations and some of the evidence related to economies of scale. While he posited a possible minimum efficient size of 1,000–1,500 students, he noted that the number of districts in this category is large but the number of students being served is relatively small and therefore the projected amount of savings would be small. He concludes:

My point is not that consolidation never makes sense; instead, my point is that the people of Michigan should not think of consolidations as a panacea. This is especially true since many of the cost savings that could potentially result from consolidations could also be achieved through cross-district sharing of services.

Andrew Coulson (2007), completed an evaluation on school district consolidation, size, and spending in Michigan. In this empirical study, Coulson set out to determine, using various statistical analyses, the extent to which school district size relates to per pupil expenditures. The impetus for the study was the policy recommendations of then Governor

Granholm who was seeking to consolidate schools in order to improve efficiency. This is not a new concept as policymakers over the years have continued to claim we have too many small school districts. However, the study was conducted by the Mackinac Policy Center for Public Policy, a well-known right leaning think tank that generally opposed policy proposals proffered by Governor Granholm.

The study is narrowly focused on evaluating the relationship between size and spending per student, and it failed to account for any differences in achievement. While efficiency may be an important indicator related to school finance, it certainly should not stand alone as the only or even the primary indicator of whether the investments are producing the desired results.

Coulson correctly pointed out that results of previous efficiency studies have produced inconsistent results and therefore “the need to gather and analyze state-specific data before embarking on a policy of school district consolidation” (p. 4). The researcher attempted to control for expenditures that could skew the data by excluding federal funding, such as IDEA and Title I, state categorical funding targeted at certain populations, percent of special education students, and racial composition. He argued that other studies have indicated there is no relationship between expenditures and achievement and therefore including achievement in his study is unnecessary, although he notes a future version of the study will include an achievement control variable (p. 11). Surprisingly, he also noted other “insignificant variables”—it is unclear whether they were included in the model and deemed insignificant or if there was an alternative approach to gauging their relevance—but among the variables listed are percent of poverty, urbanicity, and percent of families without two parents in the home (p. 11).

In terms of maximizing efficiency, he concluded the optimal size for a school district is 2,911. This leads to outlining possible savings associated with consolidating smaller schools with a theoretical value of \$31 million in savings (p. 20). However, geographic realities may limit the ability to consolidate schools to the most efficient or target enrollment size, and therefore, the real savings are likely less. He further posited that there are many more potential savings in breaking up large districts, given his analysis reveals an increase in cost per student above the 2,911. The projected possible savings for breaking up large district is listed at \$363 million (p. 19), but that is a purely theoretical calculation and omits many key variables related to the logistics of instituting redundant central office functions, complying with all of the state-level reporting requirements, bargaining new contracts with employee groups, state policy with respect to establishing the foundation grant for newly split districts, etc.

Finally, he argued that the research reveals the public choice theory of explaining expenditures holds the most predictive power (p. 19). He stated, “Arguably the study’s most significant finding is that public school officials appear to maximize school operating spending regardless of the public demand for educational services” (p. 20). This leads him to the conclusion that the solution is introducing market forces or competition in order to drive down cost while maintaining or improving quality. This speculative response is not supported by the data subsequent to his study (see Citizens Research Council, 2015).

In 2010, Professor Shakrani completed a study, initially commissioned as a newspaper article, to look at cost savings from two models: school district consolidation at the county level and coordination of services. At the time it was released, it generated a significant amount of conversation in education circles with respect to the findings; and it

was subsequently strongly critiqued by a follow-up publication also from the Education Policy Center at MSU by Dr. David Arsen. However, there are important claims worthy of review and investigation. Shakrani, like many other researchers looking to stake a claim related to economy of scale, relied heavily on an unpublished paper of Duncombe and Yinger (2001). Shakrani noted Michigan has the fifth highest number of school districts in the nation. He pointed out, "School district consolidation is likely to remain a prominent item on the education policy agenda, particularly when school districts in Michigan are under increasing pressure to cut costs and raise student academic performance" (p. 4). His conclusions after reviewing the potential of consolidating districts at the county level for ten intermediate school districts were that potential savings to the state are possible in the neighborhood of \$612 million. Conversely, given the challenges with accomplishing a wholesale consolidation of this magnitude, he posited that through coordination of services at the county level the state could realize savings in excess of \$327 million. Numbers of this size certainly capture the attention of policymakers and warranted additional review and consideration.

Dr. David Arsen, a colleague of Dr. Shakrani's at MSU, took issue with the findings based on methodological short-comings in the research. Arsen (2011) noted that Shakrani (2010) relied on an unpublished paper by Duncombe and Yinger rather than the published version that was peer reviewed (p. 3). Referring to the Duncombe and Yinger findings, Arsen noted they "did not estimate cost savings associated with the consolidation of specific services while districts remain intact. Indeed, to date there have been no high-quality research studies of the financial consequences of this form of education service consolidation in Michigan or elsewhere" (p. 4). Rather than running the same statistical analysis for

Michigan schools, Dr. Shakrani took the percent savings identified in the Duncombe and Yinger unpublished study and applied it to the specific cases in Michigan. Arsen's point with respect to the study of consolidation of services has subsequently been addressed by the research of Thomas DeLuca (2013) but remains an area for potential additional research.

It is clear from the review of the literature that consolidation conversations in Michigan and across the nation are likely to continue as states and school districts grapple with the competing challenges of declining revenue and a need for improved outcomes. Although each state has a unique set of policy parameters and financial challenges, many of the issues related to this area remain consistent across the nation. Demographic shifts, educational policies promoting the expansion of choice and charters, declining revenue and school funding models that shift control from local communities to the state all play a part of the ongoing dialogue.

Some of the key points from the empirical studies reviewed are that economies of scale exist when very small districts combine, although those savings are relatively small when considered as a percent of overall state funding. Additionally, savings realized through consolidation are often suggested as a way to provide more money for the classroom, revealing a desire to shift how money is spent rather than reduce the overall investment. States such as Maine and Arkansas that have mandated consolidation have seen mixed results and some tempering of the mandates to allow for local variables that mitigate against an arbitrary size threshold. Many states provide funding for feasibility studies, and this is an area that could be recommended for future consideration in Michigan given the research does not support involuntary consolidation based on size alone. Other factors must be taken into consideration. The research on the impact of district and building size on achievement, while

not studied in-depth here, reveals the benefits of smaller size (Cotton, 1996; Howley, Strange, & Bickel, 2000; Driscoll, Halcoussis, & Svorny, 2003) particularly for poor and minority students.

Most studies of consolidation are connected to small rural schools. Clearly, the Willow Run and Ypsilanti merger does not fall into that category. Hamilton County and City of Chattanooga Schools study of a large, urban merger conducted by Cox and Cox (2010) suggests negligible benefits as a result of the merger. However, the weaknesses of the study are illustrated by another review of the same merger conducted by the Center for the Study of Educational Policy at Illinois State University (County school districts, 2009) where they site the merger as an example of a successful consolidation. The order of magnitude in that merger is substantially larger than the Ypsilanti and Willow Run consolidation, so it also does not represent a comparable case. In fact, in this review of the literature no studies were found of district consolidations that are comparable to the Ypsilanti and Willow Run merger related to size, demographics, and financial status of the districts at the time of the merger. While nearly all districts contemplating consolidation are experiencing some degree of financial distress, the research did not reveal a case of merging two districts that were both in deficit at the time of the consolidation. Coupled with the policy context, particularly how Michigan addresses deficit districts and the emergency manager laws, this historical case study adds to the knowledge base in significant ways.

Conceptual Framework

The study design as a historical case study is intended to allow key themes to emerge throughout the process of data collection. The methodology will be reviewed in detail in the next chapter. However, the framing of how the data is interpreted is critical to ensuring the

findings and conclusions are properly grounded. Three interconnected frames serve to focus the review of the data with an eye toward answering the key research questions. The first conceptual frame relates to the leadership aspect of the consolidation effort and is grounded in research on transformational leadership, particularly as outlined by Sashkin and Sashkin (2003) who build on the seminal work of James McGregor Burns by interweaving subsequent research to provide a more nuanced and complete picture of the leadership behaviors and characteristics associated with effective transformational leadership. The second frame connects to the policy component of the study and is outlined by John Kingdon (2003) with respect to “policy entrepreneurs.” Kingdon’s work considers approaches to public policy in a broader sense, but the concept of a policy entrepreneur connects the conditions and the leader(s) at a critical moment in time (*kairos*). The final conceptual frame relates to the Greek concept *kairos* and the way in which *kairos* assists in the interpretation of historical events. The intersection of transformational leader(s), policy entrepreneur(s), and *kairos* provides the conceptual frame for the conclusions and findings outlined in Chapter 8.

Transformational Leadership

Much has been written and researched regarding leadership over the years. Distinctions between transactional and transformational leadership are highlighted by Bass and Riggio (2006). They identify four components of transformational leadership: charismatic, inspirational (through challenge and persuasion), intellectually stimulating, and individually considerate (p. 5). In *Leadership That Matters*, Sashkin and Sashkin (2003) pulled together the foundational research on transformational leadership by James McGregor Burns with additional research by Kouzes and Posner, Bennis and Nanus, and Bass among

others to create a more comprehensive understanding of the traits, behaviors, and situational context of leadership (pp. 7–15).

In synthesizing the research over the past 40 years, Sashkin and Sashkin (2003) identified eight elements of their *Leadership That Matters* framework. These include four behaviors: communication, trust, caring, and creating opportunities; and four characteristics: self-confidence, empowering-orientation, vision, and organizational context (p. 183). While not all of these aspects of transformational leadership were identified by the other researchers cited by Sashkin and Sashkin, they were able to illustrate common elements in a number of different approaches to transformational leadership and their own model. Communication and vision are common elements in virtually all of the research on effective leadership and these both emerged as key areas in the consolidation effort. Additionally, only two of the eight elements identified by Sashkin and Sashkin were not emphasized by the participants in the consolidation—although it can be argued that caring and organizational context/culture were implied. Transformational leadership represents one of three critical components in understanding the consolidation effort. A second component relates to the idea of a policy entrepreneur.

Policy Entrepreneur

The conceptual framework related to policy analysis is explicated by Kingdon (2003), specifically the notion of a “policy entrepreneur.” In order to understand the importance of a policy entrepreneur, it is first necessary to attend to the “policy window” (p. 166). Kingdon noted,

These policy windows, the opportunities for action on given initiatives, present themselves and stay open for only short periods. If the participants cannot or do not

take advantage of these opportunities, they must bide their time until the next opportunity comes along. (p. 166)

While the focus of the policy window relates to legislative action at either the state or national level, the concept of a window of opportunity is reinforced by the understanding outlined below related to *kairos*. There is a convergence of events, possibly cyclical in that there may be more than one opportunity where the conditions are right for action; however, while the conditions may be the *sine qua non*, without action by a policy entrepreneur to take advantage of the situation, the window of opportunity may be lost. Kingdon suggested that policy windows open “infrequently, and do not stay open long” (p. 166). Another important aspect of how this process unfolds is the coupling of “problems, policies, and politics” or what Kingdon refers to as policy streams (p. 178). Conceptually, the convergence of these three create the conditions for action—and thus the introduction of the policy entrepreneur, defined as “advocates who are willing to invest their resources—time, energy, reputation, money—to promote a position...” (p. 179). Policy entrepreneurs can be an individual or a small group of individuals, but there are three key characteristics that surfaced in the research related to these individuals: the policy entrepreneur has a claim to a hearing (as a result of their expertise, ability to speak for others, or positional authority); is known for “political connections or negotiating skill”; and they are persistent—Kingdon suggests this may be the most important of the three (p. 181).

The way this concept is important to understanding the consolidation effort is exemplified in the following:

The role entrepreneurs play in joining problems, policies, and politics has several implications. First, it makes sense of the dispute over personality versus structure.

When trying to understand change, social scientists are inclined to look at structural change while journalists are inclined to emphasize the right person in the right place at the right time. Actually, both are right. The window opens because of some factor beyond the realm of the individual entrepreneur, but the individual takes advantage of the opportunity. (p. 182)

The coupling of these policy streams and the individual(s) who is/are positioned to champion policy changes surfaced in the consolidation process in important ways. While the concept of policy entrepreneur is defined through a policy lens, and the leadership component through theory regarding transformational leadership, the final piece of the conceptual frame that supports an understanding of the significance of the consolidation process and policies considered in this study relates to the Greek concept of *kairos*. It is the interplay of these three components that provides the conceptual framing for the conclusions at the end of the study.

The Opportune Time—*Kairos*

In his article, *Time and Qualitative Time*, John E. Smith (2002) differentiated between two Greek words for time: *kairos* and *chronos*. *Kairos* is defined as “the right or opportune time to do something often called ‘right timing’” (p. 47). *Chronos*, on the other hand, is defined as “the uniform time of the cosmic system” (p. 47). *Chronos* is quantitative in nature whereas *kairos* is more qualitative. The juxtaposition of these two concepts of time adds value when considering historical events such as the Ypsilanti and Willow Run consolidation effort. Smith noted:

By contrast, the term *kairos* points to a *qualitative* character of time, to the special position an event or action occupies in a series, to a season when something

appropriately happens that cannot happen just at “any time,” but only at *that* time, to a time that marks an opportunity which may not recur...its significance are wholly dependent on an ordinal place in the sequences and intersections of events. It is for this reason, as we shall see, that *kairos* is peculiarly relevant to the interpretation of historical events, because it points to their significance and purpose and to the idea that there are constellations of events pregnant with a possibility (or possibilities) not to be met with at other times and under different circumstances. (p. 47)

Phillip Sipiora (2002), writing on the concept of *kairos*, noted, “In some critical ways, *kairos* is similar to another master term, *logos*, in that both concepts generated many significant definitions and interpretations and carried strategic implications for historical interpretation” (p. 1). James Kinneavy (2002) added that “The concept of situational context, which is a modern term for *kairos*, is in the forefront of research and thought in many areas” (p. 74). Smith (2002) pointed out that the chronological (*chronos*) aspect of time is a necessary condition for all historical interpretation, but in and of itself, is not sufficient for explicating a deeper sense of meaning. He emphasized,

As J.H. Randall has pointed out, history does not designate the mere occurrence of events in sequence but is concerned with their significance. ...The important point is that the determination of significance will involve recourse to all the *kairoi* or turning points in the historical order, the opportunities presented, the opportunities seized upon and the opportunities missed. (pp 51–52)

Throughout the consolidation process, the idea of this being the “right time” surfaced in conversations. The convergence of a unique set of factors at this point in time, when others had contemplated a merger previously to no avail, was not lost on the actors who led

the process. Representative Rutledge suggested, “So a lot of things aligned here and stars came together.” Smith outlined three features of *kairos* that are relevant in interpreting the significance of the consolidation. First, he referenced the concept of the “right time.” This is juxtaposed to something that could happen at “any time.” Secondly, there must be a crisis or problem for which a specific rather than generalized response is required. Thirdly, he connected the idea of *kairos* with opportunity noting that the Latin for *kairos* is *opportunitas* (p. 52). In considering these three discrete concepts related to *kairos*, it is possible to frame the historical account of the consolidation through a lens that surfaces the significance of the events apart from a simple chronological telling of the story. One final note of importance, raised by Smith as he reviewed the writings of theologian Paul Tillich, on the concept of *kairos* follows:

Tillich proposed to generalize this concept to apply to the interpretation of history, in which the dynamic is found in those individuals and movements that seek to identify the opportunity in some crucial juncture of history to seize it in the form of transformatory action undertaken in the name of an ideal. (p. 55)

It is this notion that *kairos* can be used to aid in historical interpretation of events with an eye toward the “transformatory action undertaken in the name of an ideal” that helps shape the interpretative frame for why the consolidation of the two school districts emerged as a viable opportunity at this time and not at others. However, *kairos* without transformational leadership and policy entrepreneurs, may simply represent a missed opportunity.

Having situated the case study of the Willow Run and Ypsilanti consolidation in the context of the current literature, and outlining the conceptual frame for considering the way

in which the case study will contribute and extend our understanding of specific aspects of consolidation, the next chapter outlines the way in which the study was conducted in order to answer the primary research questions.

Chapter 3: Research Design and Methodology

We seek a confluence of evidence that breeds credibility, that allows us to feel confident about our observations, interpretations, and conclusions.

—E. Eisner

Given the relative rarity of consolidations in Michigan, the consolidation of the Willow Run Community and Ypsilanti Public School districts stands out as a unique case. At least twice as many consolidation proposals have been defeated as approved in the last thirty years, and three of the successful mergers had less than 1,000 students when the districts combined. The Willow Run and Ypsilanti unification represents a different order of magnitude with a combined enrollment at the time of the consolidation vote of around 4,800 students (Michigan Department of Education, 2013). Additionally, the other mergers were small rural districts, whereas the Ypsilanti/Willow Run case included two urban districts, each with a majority minority population, high poverty, low academic achievement, and deep financial distress. In an effort to understand the conditions at the time the consolidation conversation began, coupled with a desire to surface process and policy lessons learned from the viewpoint of the leaders in the process, the researcher chose to utilize a historical case study approach.

The guiding questions for the research were as follows:

- What were the conditions (social, political, historical, community, and other) that led to the successful consolidation vote in 2012?
- What role did the Washtenaw Intermediate School District play and to what extent did the third party facilitation of the dialogue impact the final outcome?
- In what ways is consolidation a viable strategy for addressing struggling districts (deficit and academically underperforming) especially in urban environments?

- What process lessons were learned that may assist other districts contemplating consolidation?
- What leadership lessons does this case study hold for school officials, policymakers, and community officials?
- What policies supported or hindered the consolidation effort? What policy changes can be recommended as a result of the lessons learned in this consolidation?

In outlining the reasons for selecting a case study methodology, Merriam (1998) stated:

A case study design is employed to gain an in-depth understanding of the situation and meaning for those involved. The interest is in the process rather than outcomes, in context rather than a specific variable, in discovery rather than confirmation.

Insights gleaned from case studies can directly influence policy, practice, and future research. (p. 19)

Given the stated purpose of the research to identify process and policy lessons learned, the case study approach surfaced as the best tool to achieve those desired outcomes. This is reinforced by Stake (2010) where he noted, “The purpose of qualitative research is usually not to reach general social science understandings but understandings about a particular situation. By understanding better the complexity of the situation, we should contribute to setting policy and professional practice” (p. 65).

This study was bounded (Merriam, 1998) by the initial conversations between the two districts and the Washtenaw Intermediate School District beginning on June 15, 2011 with an end date of November 19, 2012 and the appointment of the new board following the election. However, it was also important to investigate the historical background and context of both

school districts as well as the policy environment which contributed to the conditions in play beginning on that day in June of 2011.

Data Collection and Analysis

Yin (2003) identified six sources of evidence for use in a case study. These include documentation, archival records, interviews, direct observations, participant-observation, and physical artifacts (p. 86). Because the proposed study is a historical case study, direct observation and participant-observation were not sources of data in a traditional sense. However, because the researcher was also a participant in the events being studied, and as one of the facilitators of the process the researcher also prepared agendas, minutes, and retained numerous records including what would be the equivalent of field notes, albeit less structured but perhaps even more relevant as a result, those documents assisted in clarifying intent related to certain decisions and served as directional cues along the journey.

The initial interview list was comprised of the following individuals selected as a result of their unique and important leadership roles throughout Phase I of the consolidation process:

Former Willow Run Superintendent Dr. Joe Yomtoob
Former Ypsilanti Public Superintendent Dr. James Hawkins
Former Willow Run Superintendent Laura Lisiscki*
Former Ypsilanti Public Superintendent Dr. Dedrick Martin*
Former Willow Run Board President Don Garrett
Former Ypsilanti Public Board President David Bates
Former State Representative Bill Rogers
State Representative David Rutledge
Former State Superintendent Michael P. Flanagan

*Superintendents of their respective districts at the time the consolidation conversations began.

Interview Protocol and Process

Upon receipt of Eastern Michigan University's Institutional Review Board (IRB) determination that the proposed study was exempt (see Appendix A), the researcher emailed the nine individuals who were identified as key leaders in the process using a pre-approved script inviting them to participate in the research study. In addition to the informed consent documentation, the prospective research participants were also sent the proposal for the study. All but one of the individuals accepted the offer to participate.

A total of nine interviews were conducted between January 15, 2016, and February 22, 2016. Each interview lasted between forty-five minutes to just over an hour in length, was audio-recorded, and subsequently transcribed. The transcription was generally verbatim with some editing of conventions of speech—for example, stuttering as well as elimination of some fillers such as “um” and “ah.” Each interview was conducted in a private location (Creswell, 2013). Five of the interviews took place in the WISD superintendent's conference room. Two interviews were conducted via telephone because the participants were in other states. The final two interviews were in locations of the interviewee's choosing. One took place in the Brighton Area Schools superintendent's office and the other at Spark-East—an economic development center in downtown Ypsilanti and the location of many Eastern Leader Group meetings.

The candidates interviewed represent a purposive sampling (Merriam, 1998). Following the completion of the first few interviews, the researcher determined that it was important to secure the perspective of yet another leader not originally on the list, Greg Peoples, given his role as both the WISD board president as the process began and his history in the community and with the two districts.

The research approach began with a simple chronological review of events with particular focus on key decision points in the process. (See Appendix B for a chronology of key dates). This outline of the sequence of events helped frame the next step in the research process and was shared with the interviewees to ensure they had the opportunity to reconstruct their thoughts within that time frame. The interviews were semi-structured (see Appendix C contains a sample of the interview protocol) with some common questions being asked of each person interviewed and more open-ended questions with follow-up for the balance of each interview based on the role each individual had in the process. For example, the questions for the elected officials and the former state superintendent were slightly different because the nature of their participation did not lend itself to in-depth knowledge in all of the areas being researched. Conversely, the historical perspective of the board presidents and the superintendents added significantly to identification of the overall context. Each research participant was emailed the questions in advance along with the timeline and research proposal in order to ensure sufficient opportunity to reflect on the key areas to be discussed. In several of the interviews, the researcher was asked to provide additional information or reminders related to the specific order of events. At times, the recollection of the participants did not align with the historical record in terms of timing, but the researcher generally did not correct those responses during the interview process unless it was part of the dialogue.

The telephone interviews presented a unique challenge in that facial expressions could not be observed and follow-up was more nuanced and limited. Additionally, there was a concern about the quality of the telephonic connection and concern that something might interrupt the process. Fortunately, those concerns never materialized. However, as a part of

ensuring the reliability of the recording of the interviews, the researcher used two recording devices rather than one. This turned out to be very important as one of the devices reached its maximum storage capacity mid-way through one of the interviews. Because the second recording device did not, nothing was lost in the process.

Subsequent to the interview and prior to finalization of the report, the research participants were given an opportunity to review quotes attributed to them for accuracy and intent. These were accompanied by the full transcript in order to provide the context of the quote from the interview. In some cases, quotes were edited to clarify intent or to address the speech idioms that may not read well in a written format. The process of member checking was used to ensure that the emergent themes and categories resonated with the key leaders in the process as a way to triangulate the data (Stake, 2010).

In addition to the interviews with key actors in the process, there was an extraordinary amount of archival information: documents, emails, publications, survey data, state legislation, newspaper articles, blogs, and agendas and minutes from various meetings. Much of the archival information was maintained by the Washtenaw Intermediate School District or was available online. By combining emergent themes from the interviews with document analysis, the researcher was able to capture the what, when, who, how, and, to some extent, the why of the consolidation, at least as framed by the leaders in the process. Utilizing the Dedoose software technology, the interviews were coded and analyzed for categories and themes. Coding is an iterative process and following the first round of coding a number of codes were condensed (Saldaña, 2016). Codes were assigned to categories initially established to align with the core research questions. The data analysis specifically honed in on areas of code co-occurrence in order to ascertain the strength of particular

themes as they emerged from the perspective of the research participants. The researcher utilized the constant comparative approach throughout the analysis of the data (Merriam, 1998). The researcher also utilized findings from other case studies on consolidation with comparable methodological approaches to compare and contrast findings in the areas of process and policy lessons. Given the differences between states with respect to policy environments and local context, the general themes provided an opportunity to assess whether there is a growing base of evidence related to process and policy in support of consolidation efforts.

Because the nature of a qualitative study requires a detailed descriptive analysis in order to capture the salient aspects in each phase, the study was limited to Phase I. This included, but was not limited to, addressing key questions relating to the factors that led to the consolidation vote (pre-conditions), the process that was utilized in order to achieve 61% support in both communities, and the policy considerations that are deemed relevant from the perspective of the key leaders in the process. Even though the case study was bounded within a defined time frame of June 15, 2011 to November 19, 2012, certain variables—including the historical context prior to the time period being studied, along with the policy components, often surfaced in the review process illustrating the difficulty of imposing artificial parameters on an organic process.

Researcher Bias and Reflexivity

As a result of the nature of the relationship between interviewer and interviewee, there was no pretext with respect to an objective and dispassionate approach to the topic at hand. Because we experienced the same phenomena together, in other words, we were co-actors in the case being studied, the interview process reflected a shared understanding while

working to unpack the unique insights from the various viewpoints of the key players. While some may suggest the role of the researcher includes a requirement to mitigate bias in the study, efforts to do so in this case would likely be deemed as contrived and ineffective. Arguably a more defensible approach is suggested by Peshkin (1988) when he noted: “I decided that subjectivity can be seen as virtuous, for it is the basis of researchers’ making a distinctive contribution, one that results from the unique configuration of their personal qualities joined to the data they have collected” (p. 18). Additionally, by consciously choosing to set to the side my own thoughts and perspectives related to the research questions and address those in an epilogue (Creswell, 2013), the findings and conclusions represent the perspectives of the other leaders in the process.

It is also important to point out the researcher’s position and views toward consolidation in order to acknowledge how they may impact the way in which the case study is portrayed. Having grown up in Michigan and graduated from a small high school with a graduating class of 47 students, I am familiar with both the benefits of a small school—including the many leadership and participation opportunities afforded to me as a result of the size—as well as the drawbacks—limited class offerings, somewhat narrow worldview, lower expectations for what was possible since many did not expect students in the community to accomplish much beyond the small town. During my time in high school, I recall conversations within the county regarding consolidation. The emotional charge around that issue remains fresh in my memory. The logical arguments for reducing the number of school districts in a county with less than 10,000 students and eight school districts were plain for many to see. However, the school I attended was the center of the community, and

no amount of logic or reason was going to convince the residence that consolidating with neighbor districts was desirable.

My first position as a superintendent was of a small district with a total enrollment of 1,300 students. The mission of our district was to provide “an exceptional personalized education,” and we worked diligently to compete in Michigan’s school of choice environment where the district was surrounded by much larger school districts who could offer more options for students. What became increasingly clear to me was that small schools, particularly those with less than 1,000 students, would struggle to survive under the funding and policy structure currently in place in Michigan. I left the small school district after five years to assume the position of superintendent of the Livingston Educational Service Agency. We served five school districts with a combined enrollment of just under 30,000 students. Consolidation was never a serious conversation given the smallest district still enrolled more than 3,000 students. However, cost pressures led to serious conversations about shared services and the creation of a transportation consortium for four of the five districts. I frequently wondered whether a countywide system would yield savings that could be redirected to the classroom and followed with interest the Michigan-based discussions on the topic out of Michigan State University. (See the literature review for a more detailed look at these).

When I was selected to serve as the superintendent of the Washtenaw Intermediate School District, having previously served as the superintendent of the smallest district in the county, I was familiar with the challenges of Ypsilanti and Willow Run and in the county in general. My thoughts about a possible consolidation at the beginning related more to the geographical proximity of the two districts rather than other factors, but given my

understanding of the school funding model and seeing the data related to both student enrollment as well as achievement, it was clear to me that the two districts were not going to be able to survive independently. I know of other colleagues at intermediate school districts who do not see this type of role/facilitation as within their purview. Many still adhere to the idea of local control and do not want to get involved in the sticky-wicket of navigating community politics in a consolidation conversation. However, it is important to make clear my views on the topic at the outset as they informed the way in which I engaged in the consolidation effort. I do not believe that consolidation for the sake of consolidation is advisable. The decision-making matrix that will be outlined in Chapter 5 reflects the core components of how I believe communities should consider whether consolidation is worth pursuing. Absent clear and compelling reasons, backed by thorough data and broad community engagement, I question whether consolidation efforts can be successful. These life experiences informed my approach to the Ypsilanti/Willow Run consolidation, and the lessons I learned in the process provided an opportunity for a deeper level of understanding and a desire to pursue a study that would formally capture the process and policy lessons learned along the journey.

Ethical Considerations

This study was limited to a review of first phase of the consolidation process by leaders who were active participants. Each person interviewed was a public official at some point, everyone except the two retired superintendents were active public officials during the process. Given that public officials have no expectations of a right to privacy related to their public actions, each participant was informed that there would be no anonymity in the research nor would it likely be possible given the narrow focus of the study, but that the

researcher would work to ensure ideas and quotes attributed to individuals comported with their intent. The research lens of process, policy, and leadership assisted in decisions related to what to include and what not to include in the final study. While achieving 61% percent support can be argued as a large margin by some, if the expectation was that it would not succeed in at least one of the two districts or that it would be close, others can rightfully point to the nearly 40% of residents who voted against the merger. Given the study was designed to address the process and policies that resulted in securing community support through the eyes of the leaders, the researcher intentionally did not investigate the reasons for opposing the consolidation.

CHAPTER 4: HISTORICAL BACKGROUND AND CONTEXT

As I walked around talking to people and as I met people, it's still kind of amazing to me that you have essentially the same zip code, with so different cultures and so different, you know, locus of interest and space.

—David Bates

To truly understand the conditions leading up to the successful consolidation vote on November 6, 2012, it is important to review the historical backdrop and context. This chapter provides a review of the important aspects of the larger community, significant historical events, economic trends, state policies as they contributed to the economic decline of the two neighboring districts, the history of competition and collaboration between the two districts, and the academic and financial challenges both districts were facing as they began the journey toward consolidation.

The city of Ypsilanti was originally settled in 1823 and given the name *Woodruff's Grove* after its first settler, Major Benjamin Woodruff (Colburn, 1923, p. 30-32). In 1824, Judge Woodward is credited with recommending the name Ypsilanti, after the Greek General Demetrious Ypsilanti, who was reported to have held off an assault of 30,000 with only 300 without losing a single man (Colburn, p. 46). Located in Washtenaw County in southeastern Michigan, Ypsilanti is west of the city of Detroit and just east of Ann Arbor, the county seat and home of the University of Michigan. While the story of Ypsilanti includes a rich history of a vibrant community, there are two points of distinction worth noting as it relates to the consolidation effort. The first is the legacy of an African-American inventor named Elijah McCoy. His father was a freed slave who settled in Ypsilanti in the 1850s. Elijah was one of several sons and he held numerous patents, including one for a lubricating cup for mechanical equipment (Colburn, 148). The Ypsilanti Historical Society perpetuates the somewhat specious claim that the phrase “the real McCoy” related to suppliers purchasing

the self-lubricating device, wanting to be sure they were purchasing an authentic version and not some lesser knock-off. The reason the Elijah McCoy story is significant from the perspective of the consolidation is that it was held up as a key example of the history of innovation in the Ypsilanti area. Why and how this narrative supported the consolidation effort will unfold as the case is spelled out in detail in the following chapters.

The other key historical point is that Ypsilanti was the site of the Michigan Normal School, which was established for the purpose of preparing school teachers. Authorized by the state legislature in 1849, the school opened in 1853 and was the first school in Michigan dedicated to this purpose (Colburn, 136). There was a strong relationship between the public school system and the Michigan Normal School from the very beginning, so much so that the School District of Ypsilanti dates its founding with that of the Normal School. The institution, now known as Eastern Michigan University, was the site of the initial and final joint meetings of the Ypsilanti and Willow Run School Boards during the successful consolidation process.

Willow Run emerged during the World War II era when Henry Ford built the Willow Run bomber plant. Referred to as the “Arsenal of Democracy” by President Roosevelt (Packer, 114), at the peak of wartime production one bomber an hour rolled off the assembly line. Many of the individuals who worked in the plant moved to the area from the south, primarily from Kentucky and Tennessee, as Peterson (2013) noted:

Despite government policy that encouraged hiring locally first, the War Manpower Commission approved recruiting workers from areas in Kentucky and Tennessee that lacked war industries. Michigan residents still made up the majority of bomber plant workers, but in-migrants from Kentucky and Tennessee numbered in the thousands.

In addition, Illinois, Texas, New York, and Ohio each sent more than 500 to work in the plant. Out-of-state workers were not only male. Many women came too, as singles, with families, or as part of working couples. (pp. 195-196)

Because so many young men were called into action in Europe and the Pacific, the facility turned to women and black residents to assist in the manufacturing process (Peterson, 2013, p. 191). Rose Monroe worked in the Willow Run bomber plant, having moved to Michigan from Kentucky. A Hollywood video producer learned that there was a real “Rosie” working in the plant and she became the video image of “Rosie the Riveter” (Marcano, 1997). This was a significant move forward for women in the workplace and their efforts contributed to the success of the allied efforts. The story of Rosie the Riveter also became an important part of the narrative during the consolidation effort, reflective of a “can do” attitude that defined the residents of the community.

Given the growing population, there was a recognized need to provide education for the school-aged children in the area. In 1943, the federal government asked the Ypsilanti school district to annex the Spencer district (which provided elementary education to students in the Willow Run area). Peterson (2013) outlined the consideration as follows:

Ypsilanti City School District officials expressed reluctance, but became convinced that the federal proposal was “the best and the right thing for everyone concerned.” At a conference of federal, state, city, and rural officials, all agreed that the merger was the only reasonable course of action. Because the annexation would completely absorb the rural, one-school Spencer District, state law required that the Spencer District hold a referendum. Despite lobbying by local leaders, including the Spencer PTA, in favor of the merger, the referendum failed by more than a three-to-one

margin. The Spencer School District Board then annexed enough territory from the other school districts so that the town site and federally constructed elementary schools would all be in Spencer's district, renamed the Willow Run School District. Thus, 130 rural voters, interested in keeping control of their school and the industrial property tax dollars, thwarted this attempt at creating a larger-than-local governing district and decided the fate of thousands of children. In the process, they relieved Ypsilanti not only of the administrative burden, but of providing high school education for their own children as well. (p. 219)

Thus, the Willow Run school district was born.

Demographics

The 2010 census provides a useful data set to outline the context during the consolidation effort. The two school districts fall within three political jurisdictions: Superior Charter Township, the city of Ypsilanti, and the Charter Township of Ypsilanti. The city is surrounded by Ypsilanti Township and Superior Township is just to the north. Only a portion of Superior Township is in the Willow Run school district, and the data shown below is not necessarily reflective of the residents in the Willow Run portion of Superior Township. The chart illustrates the comparatively low level of education in the Ypsilanti and Willow Run areas as juxtaposed with the county aggregate, which is particularly significant in terms of those with graduate and undergraduate degrees where the county percentage exceeds 50%, but the city of Ypsilanti is just under 36% and Ypsilanti Township is just under 31% and twice as many people in the city and Township did not graduate from High School as the county average.

Table 1: Educational Attainment of the Community

	Superior Charter Townships	City of Ypsilanti	Charter Township of Ypsilanti	Washtenaw County
By Education (5-Yr ACS 2010)	Census 2010 Percentage	Census 2010 Percentage	Census 2010 Percentage	Census 2010 Percentage
Graduate/Professional	21.40%	15.90%	11.90%	26.20%
Bachelor's Degree	20.40%	20.90%	19.00%	24.60%
Associate Degree	8.80%	6.80%	8.40%	6.80%
Some College, No Degree	21.10%	25.90%	24.20%	19.30%
High School Graduate	21.20%	17.70%	23.70%	16.70%
Did Not Graduate High School	7.00%	12.90%	12.80%	6.40%

The racial and ethnic make-up of the communities provides an important backdrop to the overall situation as well. While the majority of the residents in the three jurisdictions were white as of the 2010 census, the inverse was true in both Ypsilanti Public and Willow Run Community schools, where 64 percent of the student body was black.

Table 2: 2010 Race and Ethnic Background

2010 Race and Ethnic Background (Census and Headcount)

	Superior	Ypsilanti City	Ypsilanti Township	Willow Run Schools	Ypsilanti Schools
White	57.0%	59.4%	56.1%	27.5%	27.6%
Black	29.8%	28.8%	32.5%	64.7%	64.3%
Asian	5.7%	3.4%	2.0%	0.6%	1.2%
Multi-Racial	3.3%	3.8%	4.0%	1.9%	0.9%
Other	0.4%	0.7%	0.7%	0.2%	0.7%
Hispanic	3.8%	3.9%	4.6%	4.9%	5.3%

The conditions that led to this inversion of racial demographics between the community and the school district will be discussed below when reviewing the introduction of school of choice and the launch of the charter school movement.

Two Rival Districts

In his book, *Changing Classes: School Reform and the New Economy*, Martin Packer (2001) studied the Willow Run Community School District in the context of state and federal

reform initiatives through the lens of an ethnographer in a particular setting namely, Willow Run Community Schools in the early to mid-1990s. He describes the area in a clear and concise way:

Willow Run lies on the eastern edge of Washtenaw County, immediately to the east of Ypsilanti. Ypsilanti in turn is just east of the college town of Ann Arbor, the county seat, where the University of Michigan relocated from Detroit in 1837 (the year Michigan entered the Union). Ann Arbor is the largest city in the county, with a population of around 135,000; Ypsilanti is the second largest, population about 45,000. Ann Arbor, by and large, looks down on Ypsilanti, which is more working class, more black, has more crime, and contains a small state college, not a prestigious state university like the University of Michigan. Ann Arbor thinks of itself as liberal; perhaps it once was. Ypsilanti in turn looks down on Willow Run. Willow Run is literally across the tracks, the other side of the railroad line that runs through Ypsilanti. (p. 20)

Although the population numbers are from the early 1990s, the descriptions were still applicable at the time of the consolidation conversation. Despite the geographic proximity, the cross-town rivalry was a way of life. David Bates commented:

[I]t's still kind of amazing to me that you have essentially the same zip code, with so different cultures and so different, you know, locus of interest and space. We would see each other at some of the usual festivals that Ypsilanti held, Heritage Festival and things like that, and you'd realize that you didn't know one side from the other but at the same time, when it came to schools, sports, activities, there might as well have been a concrete wall ten feet high between the two districts. You just, you just didn't

talk, you didn't say anything good about the other district, and it was an ongoing battle between the two districts to attract students....(personal communication, January 18, 2016)

The School District of Ypsilanti (1849–2013), often referred to as Ypsilanti Public Schools or YPS, had a 164-year history. Over time the school district grew to more than 8,000 students. Dr. James Hawkins served as the superintendent of the district during two distinct periods. He was first hired in 1984 near the time Ypsilanti was at its peak, and he served until 1990. His recollections of the conditions at that time are important in understanding how state policies created conditions that accelerated the decline of the district. Dr. Hawkins commented,

During my initial tenure as superintendent, the county superintendents had an exceptionally close working relationship that's best characterized as one of mutual respect. School of Choice and charters were non-existent issues of concern at the time. As leaders of our respective school districts, we generally worked collaboratively on programmatic issues and other related matters affecting our school districts. (personal communication, January 21, 2016)

In a follow-up to his interview, Dr. Hawkins noted that the school district was operating in the black during his first stint in the district, that contracts were often settled with 4–5% increases, and achievement growth was prevalent with a decline in the number of students in the bottom quartile annually. He also pointed out that the district was 80% white and 20% black at that time (personal communication, January 25, 2016). Dr. Hawkins left the district in 1990 to work in Evanston, Illinois and subsequently as superintendent in Gary, Indiana, but he always maintained his residence in Ypsilanti. When he retired from Gary, he

returned home to Ypsilanti. It was about that time (2005) when the school board was terminating the contract with their current superintendent and they invited Dr. Hawkins to step in as an interim. As he returned to the district the situation was dramatically different from when he left in 1990. The district was struggling financially and academically with substantial challenges on the horizon. Across town, a similar narrative was unfolding.

Willow Run Community Schools (1944–2013) became a comprehensive school district beginning in 1944 as a result of the population explosion driven by the migration of families to the area to work in the Willow Run bomber plant. As the district continued to grow, it ultimately reached a peak enrollment of approximately 4,300 students. This was in the mid 1980s to early 1990s during the time that Ypsilanti was also growing. The combined enrollment of the two districts was close to that of neighboring Ann Arbor Public Schools. In 1987 Willow Run Community Schools hired Dr. Youseff “Dr. Joe” Yomtoob. As Greg Peoples, former Willow Run board member and Washtenaw ISD board president at the time of the consolidation, recalls, “One of the best things that I think that we accomplished when I was on the board was the hiring of Dr. Joe Yomtoob, who did a tremendous job of bringing the school district and the community together—the Willow Run community together—but he also positioned, repositioned Willow Run within the Ypsilanti community as a whole.” Dr. Joe served the community from 1987 to 1995. Dr. Joe and Dr. Hawkins recall building collaborative relationships during the time their service overlapped. According to Dr. Joe,

Willow Run was kind of a stepchild to Ypsilanti. I think the pecking order was Ann Arbor, Ypsilanti, Willow Run. And, there was a lot of big rivalry, even though a lot of parents, a lot of family and kids and family on both the school districts. You could hardly tell where one school district started and where the other one ended. But,

during my years we established good relationship with the Ypsilanti administrator and we worked collaboratively together. We had some common programming. RCTC, I think that was for vocational, and our kids participated in as well. Always a big rivalry between the two, but life goes on. (personal communication, January 25, 2016)

Dr. Hawkins noted,

When Dr. Joe Yomtoob was selected as Willow Run's superintendent, I often engaged in conversation with him on improving public relations in our districts. He was an exceptional leader and the two of us maintained a close and cooperative relationship. Though there was realistic competitiveness between the two districts that occasionally resulted in a few negative outcomes, we worked diligently to create a more positive climate between the districts. (personal communication, January 21, 2016)

Dr. Joe left Willow Run in 1995 and took employment elsewhere, but he returned to provide consulting support for Willow Run after they hired Laura Lisiscki in 2009 to serve as interim superintendent following the tumultuous tenure of Dr. Doris Hope-Jackson.

Economic Growth and Decline

From World War II through the 1980s, the Ypsilanti area was a thriving manufacturing center. Good paying jobs were available for families with no more than a high school education and some with even less (Packer, 22). The two districts combined student enrollment in the 1980s was nearly as large as that of neighboring Ann Arbor Public Schools. However, the area was heavily dependent on the auto industry; and as major employers began to close their doors, the impact was devastating. The economic decline started with the

closing of the GM production facility in Willow Run in 1993. While the number of layoffs directly related to the plant closing was approximately 4,000, the estimated impact in Washtenaw County over a three-year period was projected to be closer to 8,000 (Packer, 30). This was the first of two major GM facilities in the Willow Run community to close. An editorial in the Ypsilanti Press captured the critical sense of community in response to the devastating news of the impending plant closure:

And another asset, perhaps our biggest, is the people who make up our community. We have learned to be scrappy, to fight, to dig in our heels when outside forces—be they economic turmoil, political maneuvering, or anything else—threatens us. It is that fighting spirit that will keep Ypsilanti on its feet, and it is such strength that will not buckle in the face of betrayal by a giant company that turned its back on this community's loyalty. (as cited in Packer, 2001, p. 30)

The description of community resolve and resilience was also reflected in conversations regarding consolidation twenty years after the GM plant closing.

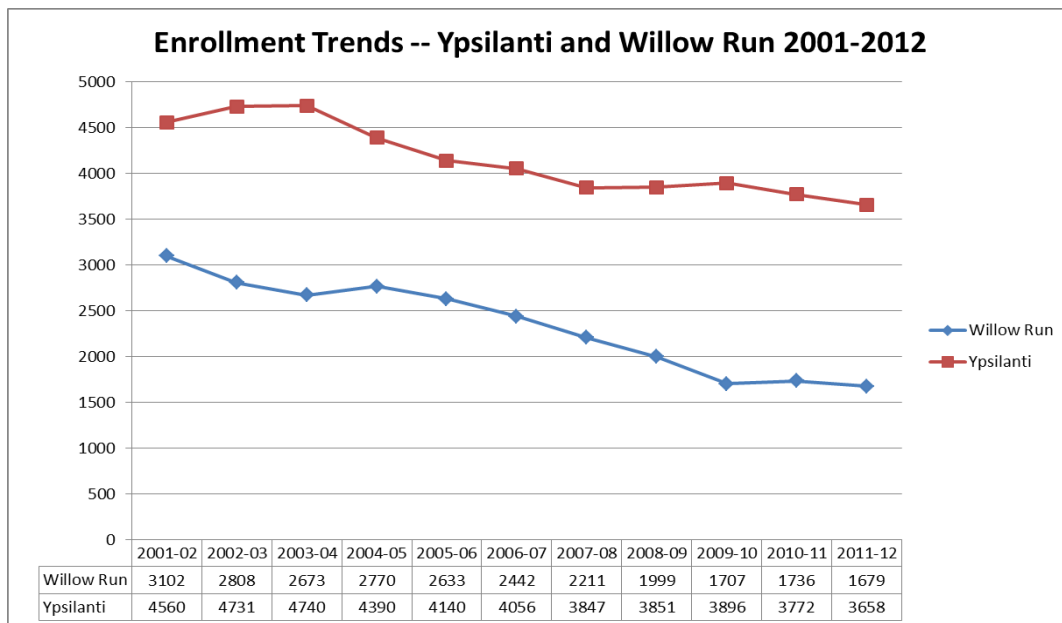
In January of 2011, *USA Today* published a story about Ypsilanti titled “Auto woes manufacture city's decline.” The author notes the closure of the Motor Wheel plant in 1997, followed by the bankruptcy of Exemplar in 2002. GM indicated it would be closing a “service and processing plant here in 2006, eliminating 100 jobs.” This was followed by the 2008 Visteon plant closing, which eliminated hundreds of jobs. The final major closure was the GM Powertrain facility in Willow Run in 2009. Located on the site of the Willow Run bomber plant, employment was as high as 14,000 in the 1970s and was as many as 4,000 in 2005. At the time the facility closed, more than 1,300 jobs were lost (Pepple, 2009). The decline of the auto industry, coupled with outsourcing of jobs where labor could be secured

at a lower cost, had a particularly devastating impact on the Ypsilanti area. Suddenly, many people found themselves without jobs and without the skills necessary to find alternate employment. This resulted in families moving away from the area in order to secure employment. As noted in the *USA Today* article, in 2004 Ypsilanti was 25% smaller in terms of population than it was in 1970, the high water mark. The ebb and flow of the economy directly impacted the local school districts.

Enrollment Trends

Enrollment trends began to decline, gradually at first but then at an accelerated pace. In 2001, enrollment in Ypsilanti was 4,560 and enrollment in Willow Run was 3,102 (see Table 3). The downward trajectory over the course of the next decade resulted in a combined enrollment of 5,300 students by the time the two districts initiated the conversation regarding consolidation.

Table 3: Enrollment Trends 2001–2012



The decline in student enrollment can be attributed to a number of factors, including a declining birth-rate, outbound migration as families left to find employment as a result of

plant closings, and the increase in the number of charter schools in the area and families choosing to send their children to other districts while still residing within the boundaries of the two districts. Several changes in state policy had a significant impact on the financial condition in both districts. These included the change in how schools are funded along with the introduction of school choice and charter schools in the mid-1990s.

State Policy Innovations

School Funding

In 1994, the voters of Michigan approved a fundamental change in how public schools are funded. Prior to passage of Proposal A, funding for schools was generated largely through local property taxes. This led to disparate levels of funding across the state. Communities that had high property valuations as a result of significant industry presence or whose electorate valued education and had capacity to pay, generated more money per student than communities that were property poor or whose residents either lacked capacity or commitment. In fact, the amount of money per student under this funding scheme ranged from \$3,000 to \$10,000 (Packer, 2001, p. 156).

The burden of property taxes and the disparity in funding across the state led to the development of Proposal A (see dissertation by Richard Diebold for a thorough review of the history of the development of Proposal A). The new funding formula shifted the burden to a hybrid model where a portion of the funding was tied to property taxes, both residential and commercial, and the balance was generated through an increase in the sales tax. While Michigan has a long history of local control, this change in funding resulted in increasing the role of the state and virtually eliminated the ability of local communities to generate revenue to support public education in their communities. A foundation grant was established based

on the level of funding being generated in school districts at the time Proposal A was approved. Governor John Engler, in a speech to a joint session of the legislature, called for all schools to receive a minimum per student amount of \$4,500 (as cited in Packer, 2001, p. 96). At the same time, provisions were made for districts that were “out of formula” so they could continue to generate higher levels of funding through a supplemental millage. While the Ypsilanti and Willow Run voters demonstrated over time that they valued education, thus resulting in a foundation grant that was higher than the state minimum, they were not out of formula and could not generate additional local funds. By shifting from a property tax model of funding public education to one that is driven by a per-student foundation grant, student enrollment became a primary indicator of a district’s overall health.

While the shift in how schools were funded was significant for both Ypsilanti Public and Willow Run Community Schools, it was the combination of two additional policy changes at the same time that signaled the beginning of the end for both districts.

Choice and Charters

In 1996, the state school aid act (MCL 388.1705 Counting nonresident pupils in membership; application for enrollment; procedures) Section 105 was introduced that established School of Choice options. Prior to the adoption of this language, students who wanted to attend another school district other than their resident district were required to pay tuition in the new district and/or receive a release from their district of residence. This was particularly troublesome for then Governor Engler. In the same speech referenced above, he railed against the inability of families to choose where their son or daughter would attend school. He decried the monopoly of the public education system and called for the establishment of school of choice as well as the launch of charter schools.

With the adoption of Section 105, students could choose to enroll in a neighboring district if that district elected to participate in school of choice. This provision was originally limited to choice within one's intermediate school district (ISD) region. In 1999, Section 105c was added that permitted districts to receive students from neighboring ISD regions as well. School districts were not required to accept School of Choice students; and in Washtenaw County, many districts chose not to participate or participated on a limited basis in the years after introduction of this provision. However, as the economy began to decline and districts were beginning to lose students, more districts opened up seats to school of choice students. Although the philosophical belief was that increasing competition and giving parents choice would drive improved performance in our schools, the twenty-year history of choice and charters does not seem to bear that out (Cowen, 2016).

At the same time as the funding for schools shifted, the legislature adopted charter school legislation and the first charter schools in Michigan opened their doors in 1994 (*Michigan's charter school initiative*, 1999). Charters were authorized as part of Governor Engler's commitment to creating more competition with the goal of producing better outcomes. Over time, Washtenaw County saw a significant increase in the number of charter schools (see Table 4). The first such school was authorized by the Washtenaw Intermediate School District in 1995. Five more charter schools were opened in the 1990s, and an additional four opened between 2004–2011.

Total enrollment in these charter schools as of 2011 when the data was prepared for the consolidation conversation was just under 4,000 students. All of the charter schools were opened in either Ann Arbor or Ypsilanti, with many of those located in Ann Arbor in close geographic proximity to Ypsilanti.

Table 4: Washtenaw County Charter Schools

PSA	Grades	Size	City	Established
Ann Arbor Learning Community	K-8	254	Ann Arbor	1998
Arbor Preparatory High School	9th-10th	163	Ypsilanti	2011
Central Academy	Pre-K-12	539	Ann Arbor	1996
Eastern Washtenaw Multi Cultural Academy	K-12	280	Ann Arbor	2004
Fortis Academy	K-8	679	Ypsilanti	2004
Honey Creek Community School	K-8	239	Ann Arbor	1995
New Beginnings Academy	K-5	125	Ypsilanti	1999
South Arbor Charter Academy	K-8	766	Ypsilanti	1999
Victory Academy	K-5	227	Ypsilanti	2006
Washtenaw Technical Middle College	10th-12th	400	Ann Arbor	1997

Representative David Rutledge, a key player in the consolidation effort, reflected on the impact of the charter school movement:

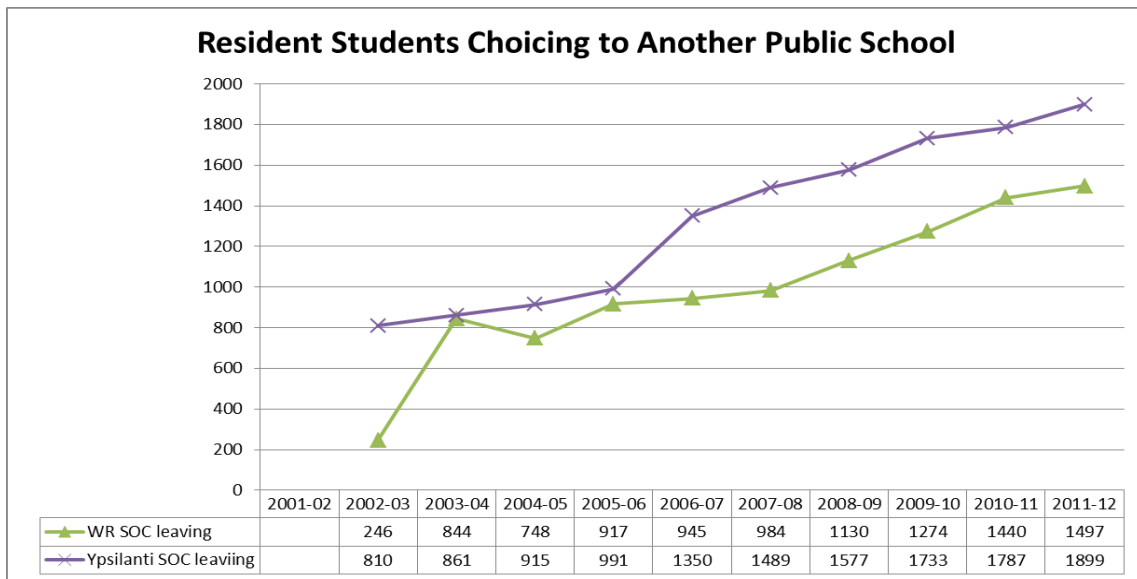
What started off as an experimental mechanism to see if there can be a private educational piece that, under the heading of competition, could make the whole educational system better by introducing into it this idea of competition. While not the only idea, competition was the overarching piece that we can somehow make it better. But in the inception of charter schools, the idea was also to create a different model here... let's put these things in a pilot situation and then let's see what we can learn from it and the good stuff we learn, let's transfer it then to our public educational system. So in its inception there was a number placed on how many of these things you could create.... Now how this folds back to the consolidation piece and the efforts of a lot of public school systems around the state is very clear and simple. Now you've created, you've taken the cap off of something that's pulling your students away, and when students get pulled away, now your budget is being absolutely jeopardized in terms of your total operation of your public entity. So, it became a, it became an absolute paradox to me. And, you know, if it is that you want

to do away with public education, this was a recipe for it. (personal communication, January 29, 2016)

The convergence of declining student enrollment with the associated loss of revenue as a result of the natural evolution of the community’s economic decline and lower birth rates coupled with the loss of students due to the proliferation of choice and charters, accelerated the decline of the two school districts. The School of Choice data is particularly significant (see Table 5). The Willow Run district saw a surge in School of Choice departures between the 2002–03 and 2003–04 school years with a steady increase in subsequent years.

Ypsilanti also saw relative modest increases in school of choice out-migration in the decade leading up to the consolidation conversation, but that trend accelerated in beginning in 2006–07 so that by the time the districts initiated conversations, more than 3,300 students were choosing to attend neighboring public schools or charter schools.

Table 5: School of Choice Trends 2002–2012

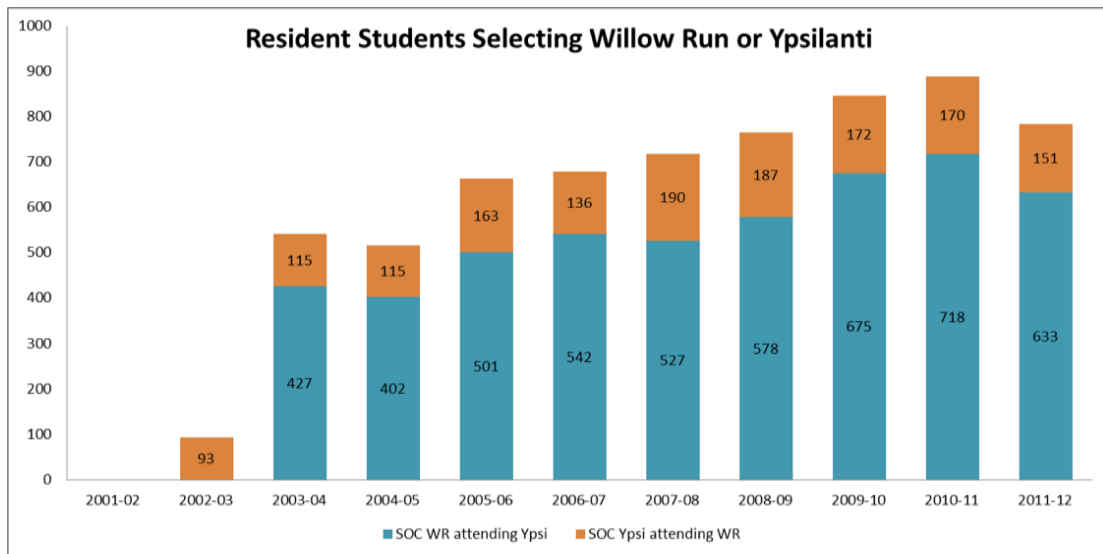


It is important to note that charter school districts (also known as public school academies) are considered public schools for the purposes of the data included in this chart.

The loss of students to School of Choice represented more than \$19 million in lost revenue for the two districts.

At the same time, both school districts were competing with each other for students. Table 6 includes the number of Ypsilanti students choosing Willow Run and the number of Willow Run students choosing to attend Ypsilanti. Former Ypsilanti Public Schools board

Table 6: School of Choice Trends Between Districts



president David Bates expressed his impressions of this trend:

And it was an ongoing battle between the two districts to attract students that meant we were competing for billboard space, for bus space, for advertising, for flyers. One of the things that got my attention, you know, as I was going all along is realizing how much money each district was spending just in the competition aspect of it. And then as each district would try and start a new program to try and gain some advantage over the other district competing for the small number of students that weren't going to charters or out of district someplace else, you realize that neither district could really do a great job, certainly not the job that the students deserved, in

terms of initiating these new programs because you only had a finite amount of money to put into it. Yet, if you looked at how much each district poured into initiating some kind of a new program, if you were to put that together, you actually could start a quality program with a good number of kids in it that had a better chance of being successful and meeting those kids’ needs. And so that was, frankly, for me anyway, a major driving force in really pushing forward on the consolidation issue. (personal communication, January 18, 2016)

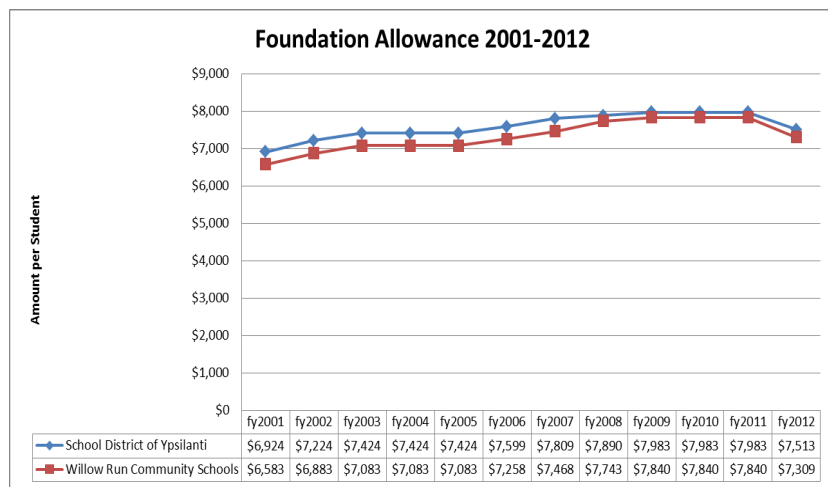
Not only were the two districts experiencing a loss of students as a result of increasing competition from charter schools and neighboring public schools, but they were also poaching from each other in a significant way. This had a direct impact on the bottom line, although the reality became more apparent in Willow Run first since they became a true deficit district at the end of the 2005–06 school year, and Ypsilanti did not exhaust its reserves until the end of the 2008–09 school year.

Financial Implications

As a result of state funding and the significant decline in student enrollment, the two school districts were on a path to

financial insolvency. Table 7 illustrates the funding trajectory over time. Between 2001 and 2009, the foundation grant increased, although it was flat for a number

Table 7: Foundation Allowance Trend



years between 2002 and 2004, between 2007 and 2008, and then again between 2009 and 2011 at a pace that did not keep up with the rate of inflation. In fiscal year 2012, the foundation grant was reduced by \$470 per pupil. This dramatic reduction in funding was essentially insurmountable for the two districts and helped prompt the initial conversations between the two board presidents. This combination of funding based on a per student count, declining enrollment, and flat funding in

the majority of years during the preceding decade, resulted in deficit spending. The fund balance total (Tables 8 and 9) for the districts illustrate how this played out in both districts.

Ypsilanti Public Schools had a rather healthy fund balance in the 2003–04 school year but began spending more than it received each year on a rather consistent basis. By the time the consolidation conversations started, the district had been in

true deficit for three years and the amount of the deficit was growing rapidly.

On the Willow Run side, there was a dramatic drop in fund balance between the 2003–04 school year and the 2004–05 school year followed by on ongoing deficit. One of

Table 8: YPS Fund Balance History

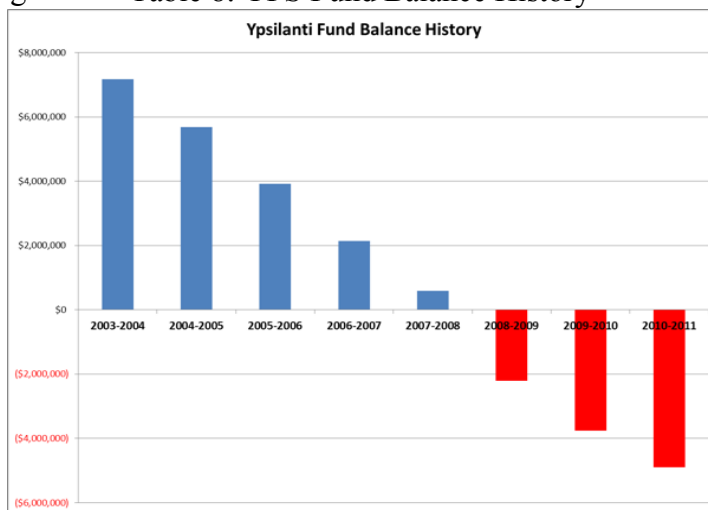
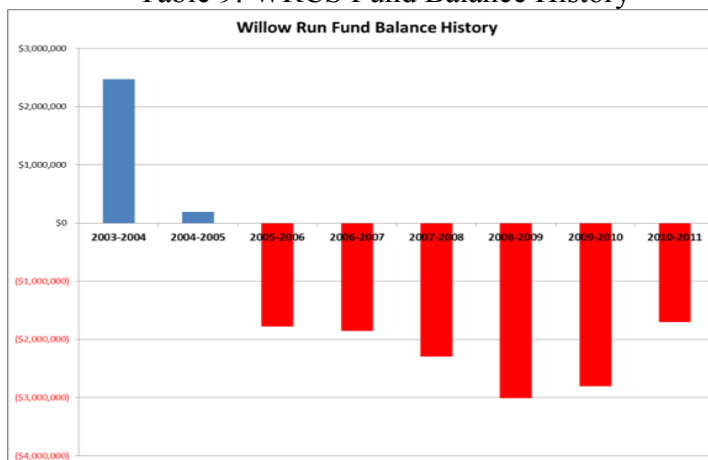


Table 9: WRCS Fund Balance History



the key differences between the two districts is that it is possible to see areas where Willow Run made efforts to reduce the deficit during the course of those years, but the district could never overcome the combination of declining enrollment, essentially flat funding, and rising cost pressures. The data displayed end the year before the \$470 per student reduction in funding since the charts are the same ones that were used during the community conversations about the current financial challenges of each district. Willow Run was making inroads in their deficit elimination efforts, but that funding cut essentially served as the final straw.

Student Achievement

While the financial picture for both districts was in a downward spiral, it was further exacerbated by student achievement results that were the lowest in Washtenaw County. Poor academic achievement and budget shortfalls resulted in cuts to educational programs that were designed to address the deficiencies. As the situation compounded, there was no amount of marketing or cutting that could stem the tide of student departures and deficit spending.

Table 10: Grade 3 MEAP Scores

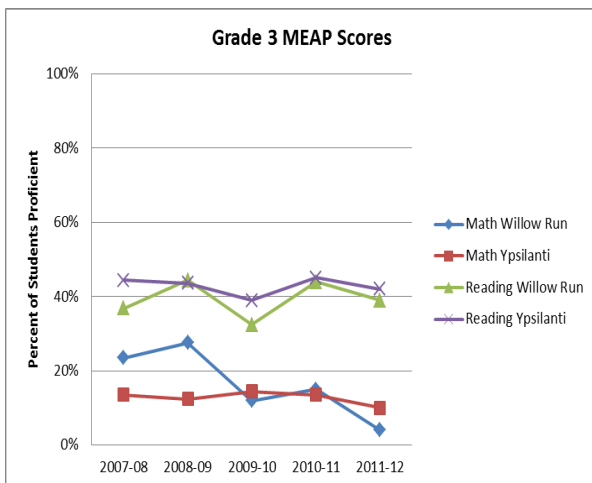
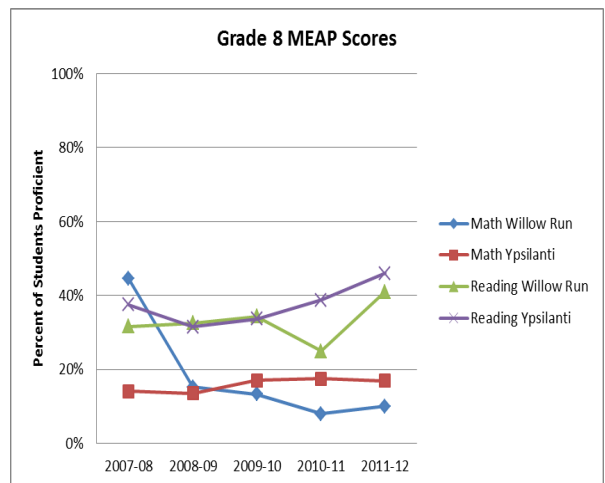


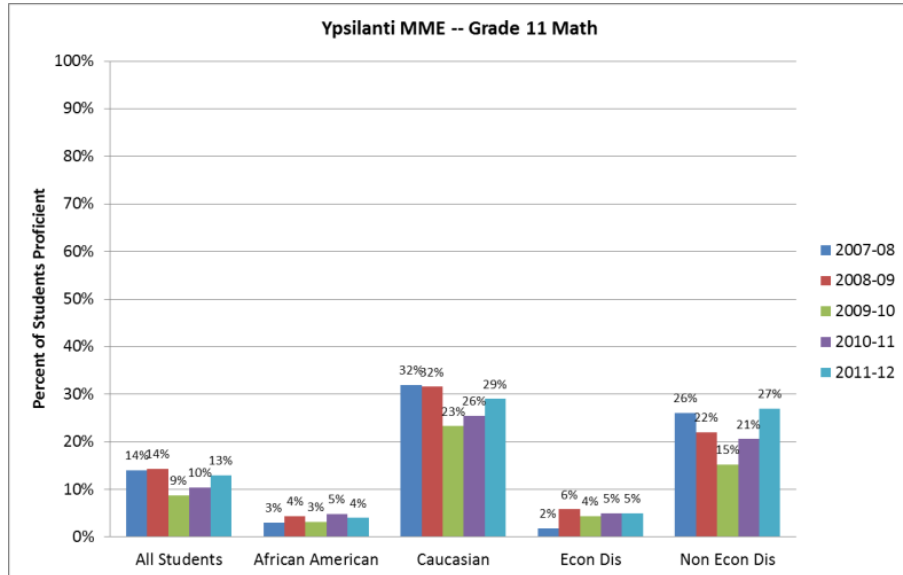
Table 11: Grade 8 MEAP Scores



Not only was overall

Table 12: YPS Math MME Scores

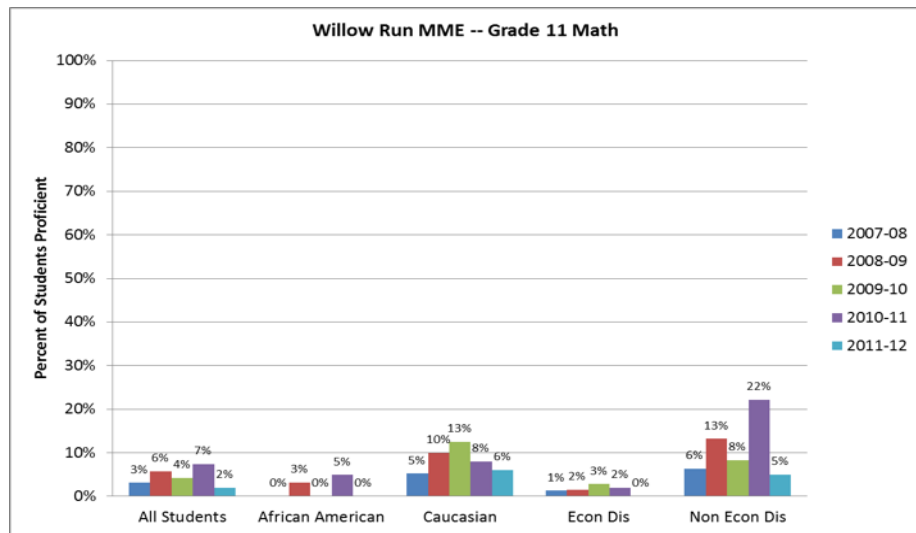
achievement at a low level, particularly as it related to mathematics, but there was a significant achievement gap



in the Ypsilanti school district

Table 13: WRCS Math MME Scores

between white and black students that raised concerns as well. In an era of competition and high stakes testing, both



school districts found themselves with school buildings on the persistently low achieving list (bottom 5% in the state) under the designations required under the No Child Left Behind Act.

In fact, performance was so low that both high schools were required to implement turn around plans prior to the time of consolidation.

Not only was academic achievement low in both districts, the graduation and dropout statistics were below state and national averages and also the lowest in Washtenaw County. Given declining revenues, even if the districts wanted to implement programs to address the significant learning challenges, the resources simply were not available to do so.

Table 14: ACT Scores

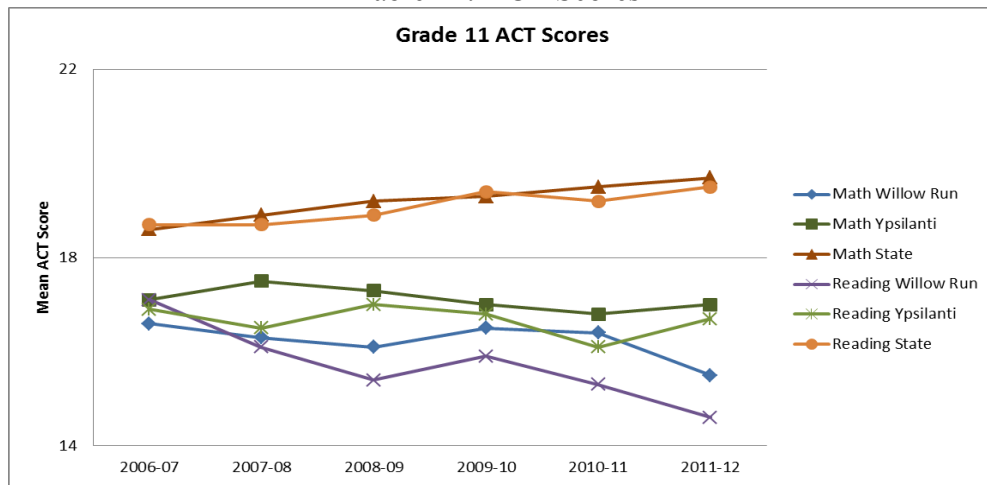
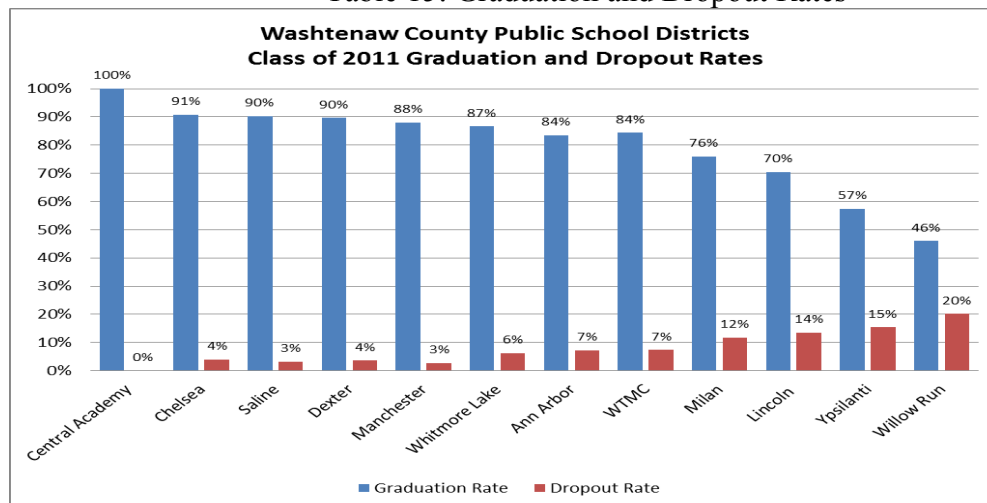


Table 15: Graduation and Dropout Rates



Policy Regarding Deficit and Low Performing Districts

Emergency Manager Laws

As the number of deficit districts increased in Michigan, the legislature updated a 1990 statute related to the appointment of an Emergency Financial Manager. Public Act 4 of

2011 was ostensibly designed “to safeguard and assure the fiscal accountability of units of local government, including school districts” (PA 4, 2011). The law established a process for identifying whether units of government, including school districts, were experiencing financial distress and provided avenues for addressing the fiscal situation. One of the options available, if a school district was deemed to be in financial distress without the likelihood of emerging from the deficit position within a two-year time period, was the appointment of an emergency manager (EM). The EM was given broad powers. These included the ability to abrogate collective bargaining agreements, cancel contracts, sell buildings (within certain limits), make staffing and academic decisions for the district, etc. The Detroit Public Schools had been operating with an emergency financial manager since the appointment of Robert Bobb in 2007 under the former statute. The authority under PA 72 of 1990 was more constricted than Public Act 4 of 2011. Several school districts, notably Highland Park and Muskegon Heights, were experiencing severe financial distress at this time. The Muskegon Heights experience also informed conversations during the consolidation effort. An EM was appointed to oversee the district in the early 2012. Among the actions taken by the emergency manager in order to address the financial distress of the district was the decision to charter the district, leaving the public school district in place simply as a way to collect the 18 mills non-homestead levy to retire the outstanding operational debt (Emergency manager documents, n.d.). This was a significant development in Michigan. Never before had an emergency manager converted an entire district to a charter school district. When comparing the demographics of Muskegon Heights to those of Ypsilanti and Willow Run, it was not a stretch to imagine a similar “solution” being imposed on either or both districts if the governor chose to appoint an EM to oversee the affairs of these districts.

Representative Bill Rogers (R), from Brighton, Michigan, was chair of the K-12 appropriations sub-committee at that time. One of the areas under the committee's purview was a review of deficit districts. Representative Rogers, reflecting on his learning curve as he assumed the chairmanship of the committee, noted:

One of the biggies was that we had joint hearings with the Senate Education Approps [appropriations] in regard to deficit districts, because, until you can get to the root of the problem—we had the superintendent of schools for the State of Michigan come in quarterly and explain it, because, this was starting to become a very big deal, and we wanted to make sure that we were on top of it. And it wasn't so much to call any department on the carpet. It was so that we were all informed to say, "ok if this is the situation, how do we best fix it, not walk away from it, not hide from it, but how do we fix it and what options do we have." (personal communication, January 15, 2016)

State Superintendent at the time, Mike Flanagan, also recalled these hearings and the conversation around deficit districts:

I can remember being a smart ass in one of them where they said, you know, if you don't take control of these deficit districts, as if I had that direct authority, you don't get control of these, we're gonna give it to Treasury. And I pulled out my phone and I dialed Andy Dillon, got him on the phone and said—"He's on here now, let's do it"—I mean it was because it's virtually unmanageable, all you can do is use the hammer. There's no subtlety. It's, the subtlety is in trying to support an initiative like you brought to the table, but that didn't happen that often. (personal communication, February 9, 2016)

In reflecting on the extent to which the deficit status situation may have impacted the consolidation conversation, Flanagan commented:

They saw that it wasn't like we or the governors (both of them, you know, Granholm and Snyder at different points) were reluctant to do emergency managers or whatever it took, so the fact that, you know you have to wonder if that wasn't hanging there. I don't know. You again would know better than I, but was that, how much of a motivation was that as opposed to trying to work something out. (personal communication, February 9, 2016)

While the emergency manager law contained implications for entire districts, another development was emerging that would impact districts in a different way related to operational control of buildings on the persistently low achieving list. What made this development even more germane to the consolidation conversations was the participation of Eastern Michigan University in the creation of a new entity designed to intervene in school buildings where achievement struggles were persistent over time.

Creation of the Education Achievement Authority (EAA)

Established in 2011 under the authority of the Urban Cooperation Act of 1967, the interlocal agreement between Eastern Michigan University and the Detroit Public Schools was designed to create an alternate model to address achievement in the buildings that were on the persistently low achieving list under the federal No Child Left Behind Act. The Governor conceptualized the EAA as the vehicle through which, under the State School Reform Office in the Michigan Department of Education, buildings could be removed from the authority of their local districts and placed under the control of the EAA. Initially, fifteen buildings in the Detroit Public Schools were placed under EAA control. A separate board

was established. Fundraising by outside partners was designed to provide supplemental resources to ensure success. Dr. John Covington, former superintendent of Kansas City Public Schools, was hired as the initial superintendent of the EAA. The initial plans called for expansion beyond the boundaries of Detroit in subsequent years. While always controversial with some groups, others were ready to see if this experiment could produce better outcomes for students in urban environments where traditional schools were not performing at acceptable levels. Given that the high schools in both Ypsilanti and Willow Run were on the persistently low achieving list and that Eastern Michigan University was the key partner in creating the new organization, many wondered whether it was only a matter of time before those two high schools were taken over by the Education Achievement Authority.

The backdrop of the new Emergency Manager Law and the Education Achievement Authority had a significant impact on the consolidation conversations as they unfolded during the seventeen months between the initial conversations in June of 2011 and the successful consolidation vote in November of 2012.

Shared Services

It is not uncommon for districts to consider shared services, particularly in times of financial distress. In May of 2011 the Washtenaw Superintendents' Association issued a statement regarding the creation of three subcommittees that would be addressing the potential for economies of scale in the areas of technology, human resources, and career and technical education. The rationale provided in the document served as the basis for the language used in the resolutions approved by the Ypsilanti and Willow Run boards of education prior to the first joint meeting in August of 2011.

Additionally, Washtenaw ISD paid for a study related to establishing a transportation consortium. Although all districts in the county participated in the study, only Ann Arbor, Ypsilanti, and Willow Run opted to participate in the Consortium as it launched in the fall of 2010. Representative Bill Rogers recalled that the initial consolidation conversation in the legislature focused more on consolidation of services (or shared services) than it did on full consolidation of districts:

Now one of the things that we did on the funding side, is went to try to emphasize a financial side that said—we're going to incentivize, and the incentives that we originally designed were around financial, not necessarily educational per se, but on the finance side. So if you looked at—for instance consolidation—if you looked at—not just consolidation. We weren't speaking of schools originally. What we were speaking of was maybe tightening up the overhead, so combining some of the resources, purchasing, things like that, then we would give you a little bit of extra money for being proactive in that regard. (personal communication, January 15, 2016)

The research around shared services supports the potential that certain economies of scale can be achieved through shared services without necessarily fully consolidating districts (Plucker et al., 2007; Shakrani, 2010; Arsen, 2011; Eggers, Snell, Wavra, & Moore; 2005).

District Consolidation Conversations (A Prelude)

During the 1960s, there was a significant reduction in the number of public school districts in the State of Michigan. As of June 30, 1960, there were 2,150 districts. Two years later that number was down to 1,795 (Michigan Department of Public Instruction, 1961); and by the end of the 1964 school year, there were only 1,437 districts (Michigan Department of

Public Instruction, 1963). The State Superintendent of Public Instruction recommended, “That legislation be enacted to accomplish in an orderly and objective manner the complete reorganization of school districts of the state so that all property becomes a part of an adequate kindergarten through twelve-grade school district” (Michigan Department of Public Instruction, 1963). He was particularly concerned with the number of areas where there were limited high school options. In some places there were no options and in others the high schools were very small and, therefore, unable to provide a full continuum of educational opportunities for students.

Reorganization of School Districts

Public Act 289 of 1964—Reorganization of School Districts—represented a significant effort to bring about even more consolidation in the State of Michigan.

Specifically, this was

An ACT to provide for the study and development of plans for the reorganization of school districts and for elections to accomplish same; to provide for the creation of state and intermediate reorganization committees; to prescribe their powers and duties; to provide for hearings and elections on reorganization plans; and to prescribe the powers and duties of the superintendent of public instruction. (Reorganization of School Districts, 1964)

The Act called for the creation of a statewide reorganization committee along with intermediate school district reorganization committees. The statewide committee recommended that all primary districts become part of a K-12 district, that a minimum size district of 2000 students be established, and the size of the graduating class be at least 100 (Vogel, March 1965). In Washtenaw County, the reorganization study committee held its

first meeting on February 23, 1965. On April 23, 1965, at the fourth meeting of the committee the second recommendation coming from the Phase II committee was “That it would seem advisable and logical for the Willow Run and the Ypsilanti Districts to be combined, so that with the above-assigned Primaries, the result would be a good-sized school district” (Vogel, April 23, 1965). The minutes also reveal that the group spent considerable time considering the possibility of a countywide district in order to address issues of equity and quality across the county (Vogel, May 24, 1965). While there was some momentum among the reorganization committee, conversations with other school board members and the local superintendents quickly revealed that there was not a broad base of support for moving toward a countywide district. Thus, the final recommendation for reorganization led to several primary districts becoming part of the ten K-12 districts that were in place at that time.

Over the years, individuals continued to raise the question of whether Willow Run and Ypsilanti should combine. As Laura Lisiscki noted, “I had heard the words *consolidation* for years... I mean, almost twenty years” since the time she started in the district as a classroom teacher (personal communication, January 15, 2016). Dr. Joe also recalled that there were discussions at various times, particularly when one district or the other was experiencing financial challenges, but ultimately there was no support for the concept in the larger community.

Dr. Hawkins recalled raising the question of consolidation back in 1985, shortly after starting with the district:

I must admit that during my early tenure as superintendent, I thought the idea of three school districts located in close proximity in the City of Ypsilanti was ludicrous. This

was puzzling throughout my six years in the district and it never seem to be a priority with any of the people in the districts with whom I had much discussion. This included board members, community leaders and the former Executive Director of the Ypsilanti Chamber of Commerce. I often posed the question of whether the idea of consolidation had ever surfaced, as well as the absurdity of three independent school districts located in Ypsilanti. The conversation seemed to always fall on deaf ears as no one was really interested. (personal communication, April 19, 2016)

Those conversations never gained any traction, but Dr. Hawkins continued to believe that the consolidation of the three school districts made the most sense. When he interviewed for the interim assignment in 2005, he inquired whether there had been any additional conversation regarding consolidation: “During that interview I remember, I think I broached the subject of consolidation again, you know, had there been any movement since I’d been gone—and I’d been gone fifteen years. And it still seemed to be a logical thing for the districts to consider since it was evident there were major financial issues that the districts were having.”

Dr. Hawkins continued to pursue the conversation in partnership with various board members and he always thought it made the most sense to include Lincoln Consolidated as part of that discussion. However, there was a general consensus that the Lincoln community would never embrace the idea so the conversation narrowed to a discussion regarding Willow Run and Ypsilanti.

In 2007, Dr. William C. Miller, superintendent of the Washtenaw Intermediate School District, convened a meeting at High Scope Foundation in Ypsilanti. State Representative Alma Wheeler-Smith, Dr. Miller, the board presidents from the three districts, along with one other board representative. According to Bill Miller (personal

communication, February 18, 2016), Representative Wheeler-Smith was going to attend meetings of each of the school boards and discuss the consolidation idea. However, it was clear that there was no interest on the part of the Lincoln Consolidated district to continue discussing consolidation. Ypsilanti and Willow Run were willing to continue discussions; that is until a new superintendent was hired in Willow Run in June of 2007, and the discussions fell.

In February of 2009, Ypsilanti School board president, David Bates, drafted a letter to his colleagues across the county requesting a meeting of the school boards to “examine the financial challenges we are facing.” In the letter, he outlined the Ypsilanti situation along with noting the five-year trend in terms of funding from the State of Michigan. As a result of inadequate state funding, Mr. Bates noted, “The citizens of this community have been subsidizing the state by selling off assets and depleting the district’s savings by 2 to 2.5 million dollars a year.” In March, the Washtenaw Association of School Boards met and had a conversation regarding strategy related to school funding. Subsequent conversations led to a countywide enhancement millage proposal that was defeated by a substantial margin. However, as districts struggled with increasing cost pressures and stagnant or declining funding from the state, it was clear that all options to address the challenge needed to be considered.

During the summer of 2009, the Ypsilanti and Lincoln Consolidated School boards passed resolutions calling for conversations regarding consolidation of services. The Ypsilanti board also contemplated the possibility of including Willow Run (June 8, 2009 board minutes). These resolutions focused on sharing of services and not consolidation of the districts. As Dr. Hawkins noted,

Ideally, I always believed the best consolidation plan should involve the three school districts of Ypsilanti, Willow Run, and Lincoln. It became explicitly clear during my early conversations that even if there was minimal interest from some segments, the Lincoln School District would never participate or get involved. (personal communication, April 19, 2016)

Part of the reason Dr. Hawkins did not see the advantage of a consolidation with just Willow Run related to the deficit they had accumulated since the 2005–06 school year.

Deficit Districts

The Willow Run Community School district became a deficit district following the 2005–06 school year. Although the purpose of this study is not to investigate all of the factors that led the districts into their financial distress, a few key points are possible to highlight with a cursory overview of the situation prior to the time consolidation conversations began. Since 2001, Willow Run had five different superintendents. One of those superintendents was sent to federal prison for crimes committed at another district, and he left with significant questions about decisions made at Willow Run. Dr. Doris Hope-Jackson was removed from her position as superintendent and reassigned as the director of information and assessment following an extended absence related to an auto accident. The tumultuous relationship between the school board and Dr. Hope-Jackson continued until the board ultimately decided to terminate her contract in September of 2010 (Jesse, 2010). During this time, the district continued to lose students and struggle with student achievement. When Dr. Hope-Jackson was removed from the superintendent position the school board turned to Laura Lisiscki, a long-time school employee and an elementary principal at the time. The board, staff, and community respected her, and it was their hope

she could provide some stability in leadership while they navigated the significant challenges facing the district. As Ms. Lisiscki recalled (personal communication, January 15, 2016), “She was put on leave and they needed an acting supe and that’s when they just plucked me from the building and put me in that position to kind of steady the waters, calm the waters if you will.” Because Ms. Lisiscki did not have central office experience, she called on her mentor and friend Dr. Joe to guide her as she stepped into the leadership chair. This partnership turned out to be extremely important not only as Ms. Lisiscki grew into the role of superintendent, but throughout the consolidation process.

As a deficit district, one of the first things Superintendent Lisiscki had to do was work with the union to secure concessions at the bargaining table. Morale in the district was very low and before talking about concessions, Ms. Lisiscki had to help the school community understand the nature of the financial challenges and rebuild trust: “I was busy trying to figure out how to get the trust and morale back and at the same time trying to figure out how to be a superintendent.” Although concessions are not an easy conversation, Superintendent Lisiscki was committed to being transparent, “We had a state of the district address meeting and we just kinda had the information on the white board that said here’s our numbers, here’s what we have, here’s what we need to do, here’s how we need to survive.” While she was able to negotiate contracts successfully, those savings were insufficient to eliminate the operational deficit completely. As a result of the significant decline in student enrollment, the district also needed to consider closing buildings. One of the most challenging experiences a superintendent can have is dealing with community backlash related to decisions around closing buildings. That was not the case in Willow Run. Ms. Lisiscki

recalls having about 26 different community meetings. The approach to closing the buildings appears to be part of the reason there was not a loud community outcry:

We went through a process of closing two buildings. It was about actually re-structuring the programming in the buildings that were open. We were able to take the emotions out of which buildings to close, we used the programming that would fit in those particular physical buildings, those would be the ones that stayed open.

(personal communication, January 15, 2016)

After going through that process, the board approved closing Kaiser Elementary and Cheney Academy. The story, in *AnnArbor.com* on June 10, 2011, is titled “2 Willow Run Schools Close for Good on Friday Amid Both Tears and Hope for Future” (Feldscher, 2011). In the article, the Kaiser principal reflects on the mixed emotions and is quoted as saying, “The vibe has been pretty good with the community. Nobody wants to close a neighborhood building, but overall, it’s been pretty good as far as parent support and with the reconfiguration the way it is.” The article reflects a clear understanding by building principals and staff who spoke with the reporter that the changes were necessary and that education was about more than the brick and mortar buildings. Ms. Lisiscki provided more insight into why this was the case:

Well, you know what, there wasn’t a lot of outcries. There were no people that came in tears or crying or you know yelling at board meetings or such. They were all agreeing to move forward with the fact that those particular buildings were being closed because we needed to right size to try to save the overall district as a whole, to do what we needed to do for kids. So it might be oversimplifying it, but the only thing that I can say Scott, it really was based on trust, on who was leading and who was

standing up there talking. And that was when I would stand at every one of those community meetings, and I would be the face. I was the one that was talking, saying, “this is what we need to do; here’s why we need to do it. This is about programming. This is about our kids. This is not about the brick and mortar. I want you to hear from my experts because the people standing alongside me, they’re the experts. They’re the ones that are with your children each and every day, and they’re going to tell you, in their own words, why this is gonna be ok.” And that was really the key, and it goes back to that Flyer pride. The community really, really did trust us. (personal communication, January 15, 2016)

The high levels of trust within the community and the way in which the conversation around the reconfiguration occurred resulted in acceptance of the changes as necessary for the future of the district. This stands in stark contrast to the situation in Ypsilanti where, just a year earlier in 2010, the district decided to close East Middle School and Chapelle Elementary.

Ypsilanti Public Schools historically had consistency in the superintendency. While Willow Run had five superintendents since 2001, Ypsilanti had five superintendents since 1984. When Dr. Hawkins retired for a second time, the district selected Dedrick Martin (2009–2013) for the position. The district had been in a solid financial position with nearly \$10 million in reserves at the end of the 2002–03 school year. However, the district began spending more than it received on an annual basis until all reserve funds were exhausted, and they officially became a deficit district at the end of the 2008–09 school year—the same time as the district was bringing on Dedrick Martin as the new superintendent.

Superintendent Martin, a Michigan native, was returning to the state having most recently served as Director of Equity and Achievement for the Champaign, Illinois Unit 4 school district. He accepted his first assignment as a superintendent in a district that was experiencing severe financial stress, and he was chosen after the board deadlocked on the two finalist in the initial search process. Board president Bates recalls what he was looking for in a new superintendent:

I was and I think a majority of the board was looking for a person from outside the district, and maybe even outside the area, that would be able to come in with a fresh perspective and without the personal ties and obligations that were fostering that culture of family that was getting in the way of our making the difficult decisions that needed to be made along the way. (personal communication, January 18, 2016)

In preparing a budget for the 2010–11 school year and needing to reduce expenditures by \$6.4 million, Superintendent Martin recommended closing East Middle School as well as Chapelle Elementary. An *AnnArbor.com* report on March 19, 2010, outlined the rationale for the recommendation that was presented by the superintendent in a thirty-minute slideshow (Perkins, 2010). There were many questions from board members and concerns expressed by parents from Chapelle Elementary. On March 23, 2010, the board voted 5-2 to close both East Middle and Chapelle Elementary. The community outcry around the closing of Chapelle Elementary was significant. A “Friends of Chapelle Elementary” Facebook page was created to share information and encourage action. Community comments on the articles in *AnnArbor.com* (Perkins, 2010) displayed a significant amount of emotion around the topic and distrust regarding the motives and rationale for the decision. Mr. Bates himself was somewhat surprised by the community backlash:

In the effort to cut costs, the most significant decision that got made was that to close an elementary school and we closed Chappelle Elementary. And that was a much greater political battle than I really had expected. Somehow there's a part of me that imagined that once you show people the numbers and you show 'em the logic behind it and the rationale, that people will be able to understand it. And it just wasn't the case and the political backlash was unanticipated and much bigger than I expected. The interesting thing about that is I worked really hard to try and talk with those people and meet with them in neutral territory, and try and help them understand the reasons and the rationale behind those decisions, especially the ones that were most vocal. I remember one coffee in particular that was particularly interesting to me was somebody who was certainly in a position to understand the rationale behind the decision, and the importance of it. And as I sat with this person and we're talking about it, I'm explaining what's going on, and the reason that we had to close this particular school and, finally, she was honest enough to say, privately unfortunately, not publically but privately, she said "I understand your rationale completely correct"—she says, "but don't close my school, it's my school. Don't close my school—I don't care what other school you close, but don't close my school." And, you know, to me that's just, there's no answer for that one. There's no response for it. I could certainly say ok I won't close your school, but my legal obligation is to make a decision in the best interest of the district and the community, not her. And, you know, I don't think she was ever able to understand that and, I think at one point, led an effort to oust me, despite that, that's just the hits that you take from political stand

point in the course of making those kinds of decisions. (personal communication, January 18, 2016)

The juxtaposition of the community response to the closing of Chapelle Elementary (in contrast with the unemotional closing of East Middle School) and the closing of two elementary buildings in the Willow Run district the following year helps paint a picture of the dynamics in each community as the consolidation conversations got underway. In Willow Run, the board selected a leader from within the system who had a base of support and built trust within the school district and community. Her approach was to engage in conversation and provide information that helped everyone understand the nature of the situation. Her leadership style was not that of a charismatic, dominant personality. Instead, she shared the stage with her leadership team. She engaged people in the process and kept the conversation focused on the educational opportunities for students rather than protecting a particular building. Her leadership approach was in line with the five practices outlined by Kouzes and Posner (2002) including modeling the way, inspiring a shared vision, challenging the process, enabling others to act, and encouraging the heart (p. 13). Tapping into the deep sense of community identity (Packer, 54), the decision to close two elementary buildings was embraced without the usual emotional fanfare. Conversely, the closing of Chapelle Elementary continued to surface throughout the consolidation process and even after the vote with evidence of deep-seated mistrust of the school board and school administrators. As the consolidation process unfolded, the success of the Willow Run downsizing and the process used to generate that outcome, served as a helpful guide for taking the next steps on the journey.

Board Leadership

David Bates joined the Ypsilanti Public School board in 2006 and was elected to serve as president the following year. He was one of the lead organizers of the conversation in 2007 with school board members from Ypsilanti, Willow Run, and Lincoln, along with Representative Alma Wheeler-Smith and WISD Superintendent Miller. Although that effort failed to materialize into action, Mr. Bates recalled his belief in the importance and necessity of the work:

The next thing I got was, Superintendent Hawkins essentially called me in for a meeting and said he'd heard from the other superintendents and that I should not talk to their board members ever again. And, so that was sort of the end of that effort, and it went sort of down in flames, but it didn't stop me believing, perhaps even more so believe that there was a reason that that happened, but it was still the right direction to go in. (personal communication, January 18, 2016)

Across town, Don Garrett Jr., Willow Run class of 1990, had been appointed to fill a vacancy on the Willow Run board in November of 2009 and was subsequently elected to continue serving on the board in May of 2010. He was chosen to serve as the board president and quickly learned how challenging the issues were in the Willow Run district. His focus while leading the board was always about what was in the best interest of the students, and it was that focus that guided his engagement in the consolidation conversation.

In the spring of 2011, as both boards continued to deal with their financial challenges, Mr. Bates approached the Ypsilanti superintendent and asked whether he believed it was time to revisit the consolidation conversation. As Mr. Bates recalled, Mr. Martin was somewhat skeptical about the likely receptivity of Willow Run, but that it would help with addressing

the substantial financial challenges. Accordingly, Mr. Bates reached out to Mr. Garrett and invited him to meet. Mr. Garrett, while not necessarily wanting to meet, agreed and the two sat down over beverages in an area Buffalo Wild Wings restaurant to talk about the issues and challenges each district faced. According to Mr. Bates, he put his grand vision for total consolidation on the table at that meeting. As he recalled, “In the interest of transparency, I kind of gave him my big picture, but we both talking about it recognized that it was not going to be possible to lead with that card.”

Mr. Garrett was not immediately supportive of the idea, but he also agreed not to dismiss the idea without further conversations with important people in his life.

We had the conversation, and we talked about it, and I said, “You know, right now I’m not too much sold on it,” and he was like, “Well, I extended the offer to the past board, I think it had to been about four or five years prior, and they just immediately just rejected it”; and so I said, “Ok, I’ll sleep on it or whatever it may be, talk to my wife, talk to people in the community.” Then at that time I really started digging and seeing, ok, where are we financially? Where are we as a district as Willow Run? And the more and more you dig and the more and more you go to meetings, and you set there and they talk about, ok, we gotta do another cut, we gotta do another cut. And now you looking at the kids, where they can’t get the classes that other districts are getting. (personal communication, February 22, 2016)

After some reflection, Mr. Garrett agreed that it would be worthwhile for the two school boards to begin a dialogue. Both board presidents realized that building a relationship and developing trust was a precursor to having any meaningful conversation about consolidation. To that end, they also concluded that it was necessary to invite a trusted third

party to facilitate the conversation. It was at this point that they turned to the Washtenaw Intermediate School District and requested a meeting.

Summary

The historical context and background of each consolidation situation is different and local context matters. Like so many other consolidation discussions, the Willow Run and Ypsilanti history includes districts that were rivals. In studying the social, political, and historical conditions that led to the successful consolidation vote, the background information reviewed in this chapter paints a picture of key elements that contributed to the final outcome. One of the key questions that surfaced in reviewing the historical context is why was the effort in 2011–12 successful when so many other conversations about consolidation failed to gain traction? The conceptual framing of *kairos*, coupled with leadership that responded by grabbing hold of the opportunity, begin to take shape in reviewing the historical background and conditions. Additionally, the idea of a policy window with policy entrepreneurs also begins to emerge. It is possible to frame the consolidation momentum in 2011 and 2012 as being *kairic* in the sense that there was a convergence of the following elements that ultimately reflected an opportunity for action in a way that did not exist in prior times and conversations around the idea of district consolidation.

Among the key elements were the policy changes in the mid 1990s that set the stage with respect to shifting demographics within the district. As parents were given choice and school funding moved from a local tax base to a state-driven system on a per student basis, combined with the introduction of charter schools, the landscape changed significantly as many families enrolled their children in other schools. This was compounded by the plant closings and loss of jobs. While the impact of the policy innovations of the mid 1990s took

time to emerge, by the time of the consolidation conversations in 2011, the loss of students as a result of choice and charter options was a major economic factor in the deficit situation of the two districts. Additionally, the law around deficit districts and the potential for an emergency manager to assume control was a significant and viable “threat” to local control of the public education system.

Another key factor that surfaced was visionary, transparent, courageous leadership and a willingness to do what was necessary to address the educational needs of the students in the community. The 2007 aborted attempt at consolidation discussion is a case in point; a singular leader had the ability to derail the conversations. The convergence of the two board presidents, two first-time superintendents in Ypsilanti and Willow Run, and a new superintendent at the Washtenaw ISD with an openness toward exploring all viable options were essential components in responding to the opportunity.

The academic and financial challenges of the districts were significant, but by themselves would not likely have led members of the two communities to support a merger. The threat of an emergency manager or takeover of the high schools by the Education Achievement Authority was also relevant and impacted the willingness of the communities to consider consolidation as an option, but these also were insufficient in and of themselves to drive a consolidation vote. Many districts across Michigan, for example, Buena Vista and Inkster, where both districts were dissolved subsequent to this consolidation, were in similar financial and academic distress and facing takeover and did not opt to pursue consolidation as a mechanism to retain local agency in the delivery of public education services. Financial incentives and state policy in support of consolidation constituted an important backdrop, but

many of the specifics were not finalized until after the consolidation vote raising the question regarding what impact they had on the decision of the two communities to come together.

In the next three chapters is a review of three sub-phases of the first phase of the consolidation effort. This will help explain the convergence of all the variables discussed above, coupled with the visioning process of what a new unified district could be, that ultimately motivated people to support an idea that was previously unthinkable.

CHAPTER 5: INITIAL CONVERSATIONS

And in that meeting we could see ..., we were in the financial death spiral that was gripping a lot of districts at the time and that there was no really good way, not going to be any good way out.

—Ypsilanti board president David Bates

Given the financial and academic challenges both school districts were facing, the situation was becoming more urgent. At the meeting in the spring of 2011, Mr. Bates and Mr. Garrett both agreed that it was important to have a neutral third party convene the conversation with the two boards of education. Mr. Bates recalled:

And so what we talked about doing was two things and that is—ok, can we look for areas, can we convince people that we could find areas where we could work together and improve efficiency—yeah we probably could do that; how can we get people to buy in on some level with some trust because on both sides of the divide, trust was very very very low, and the answer was—“well let’s call the ISD and see if they can play a role in that because somebody’s going to have to come in as a third party”.

And that led to the phone call to you and then the consequential meeting what, June 15, I guess I think you had in your timeline, that started that ball rolling. (personal communication, January 18, 2016)

In reflecting on his support for the facilitation role of the Washtenaw Intermediate School District, WISD board president Mr. Greg Peoples, indicated his rationale. Specifically, “I did not like the possibility of one district in Washtenaw County coming under an emergency manager, but the possibility of two coming under, two particularly in the city of Ypsilanti, coming under an emergency manager, I just thought that would be a disaster...” (personal communication, February 11, 2016).

On June 15, 2011, the first meeting was held at the Washtenaw Intermediate School District in the superintendent's conference room. The attendees included Don Garrett, president of the Willow Run board of education; Laura Lisiscki, interim superintendent of Willow Run; David Bates, president of the Ypsilanti Public Schools board of education; Dedrick Martin, Ypsilanti superintendent; Dr. Youseff (Joe) Yomtoob, former Willow Run superintendent; Rick Leyschock, interim WISD superintendent; and Scott Menzel, incoming WISD superintendent and researcher on this project.

The meeting agenda included a review of why the board presidents requested the meeting; the value of working together in order to help students succeed; a review of the conversation regarding possible consolidation back in 2007 that included representatives from the Lincoln Consolidated School District, Ypsilanti Public, and Willow Run Community Schools; the potential of the appointment of an emergency financial manager (EFM); and the outline of an agenda for a joint board meeting to engage in more formal discussion regarding how the two districts could work together (notes, June 15, 2011 meeting—superintendent's archive). The participants agreed to hold a "meet and greet" social hour prior to the joint board meeting in order for board members from the neighboring districts to get to know each other. The initial meeting concluded with a reminder that doing what was in the best interest of students motivated these conversations. In an *Ann Arbor News*, Ypsilanti Focus edition on June 26, 2011, the lead article focused on the outcome of the meeting and planning for a joint board meeting:

"I see the relationship as where we're both having each other's interest at heart,"

Garrett said, "We lie on the same page and we want the same for our kids, plus it's

just better for the whole part of eastern Washtenaw County if we're able to work together and get along." (Feldscher, 2011)

This case study is bounded (Merriam, 1998) by signature events over a period of time. While the complete story of the consolidation extends beyond the scope of this study, this first phase is bounded by the June 15, 2011 meeting through the appointment of the new board following the consolidation vote (November 19, 2012). Within that period of time, there are three distinct sub-phases that, through careful analysis, contribute to an understanding of the process lessons learned as well as policy considerations. In this chapter, we will review the first sub-phase including the leadership structure to guide the effort, the first joint board meeting (August 24, 2011), the process that was launched following that meeting to engage in deliberate and thoughtful review of opportunities for shared services, policy considerations as they emerged, and finally, the second joint board meeting, which resulted in a vote of both boards to pursue full consolidation predicated on the development of a comprehensive plan (April 16, 2012).

Leadership Structure

Following the initial meeting and the agreement by WISD to facilitate the conversation, planning for the first joint meeting of the Willow Run and Ypsilanti Public School boards of education took place with meetings on July 12 and 27, 2011. The three superintendents, representing WISD, Ypsilanti, and Willow Run, had frequent conversations prior to the meetings that were held throughout the process. A steering committee comprised of the superintendents and board presidents and one individual selected by the superintendents from each of the two districts, typically the two former superintendents: Dr. Hawkins and Dr. Yomtoob, emerged as a core planning team. At the meeting on July 12,

group norms were established that reflect core commitments from the very beginning (Superintendent's Files, 2011). The norms included respect, consistent communication, open and honest dialogue, trust, and administrative communication. Specifically, each superintendent committed to a minimum of weekly communication with respect to consolidation and shared services efforts. These norms reflect commitments that continued throughout the process and that surfaced as key lessons learned in the interviews with the leaders. In addition to group norms, communication points were identified that served as a prelude to the initial joint board meeting. The "communication points" document called for both boards to reaffirm previously passed resolutions relating to shared services "in order to pursue all viable options to maximize learning opportunities for all of our students" (Superintendent's Files, 2011).

It is important to note that the initial meetings proceeded deliberately and slowly as the participants were building relationships. While the two board presidents requested WISD facilitation as a result of the institutional relationship over time, the leadership at WISD was in the process of transition. The new superintendent, while not a stranger to Washtenaw County as a result of having been a local district superintendent from 2002–2007, did not have a history with the current leadership in either Willow Run or Ypsilanti school districts. However, he did know and previously worked with State Representative David Rutledge on the countywide early childhood initiative (Success by 6) when he was a local superintendent and Mr. Rutledge co-chaired that initiative. Additionally, while the superintendents of Ypsilanti and Willow Run knew each other, Ms. Lisiscki recalled, "I mean, the ISD did actually start the relationship. I wasn't reaching out to him, I was too busy trying to save my district" (personal communication, January 15, 2016).

One of the themes that emerged during the course of the interviews with the key leaders in the process was the importance of transparency and building a trusting relationship. As Kirtman and Fullan (2016) noted in their book on leadership, “Trust is a core factor in cultural change” (p. 19). The board presidents knew by requesting the facilitated conversation that building relationships would be a critical component of the work ahead. While the expectation was that these conversations would ultimately lead to consolidation of the two districts, most of the participants did not expect the process to move as quickly as it ultimately did.

The steering committee carefully considered the agenda for the first joint board meeting when they convened on July 27 in the WISD boardroom. Representative David Rutledge also participated in that meeting, specifically to discuss policy and state incentives. The agenda for the meeting reflects a thoughtful and deliberate approach to bringing the two boards together with carefully constructed resolutions that would provide the parameters for the next steps in the process and a social hour preceding the event including a planned pair/share activity in order for individual board members to get to know each other.

Each board was asked to pass a resolution prior to the joint board meeting affirming a commitment to working on consolidation and shared public services. In the “whereas” section of the resolution, the boards referenced the \$470 per pupil reduction in 2011–12, acknowledged the significant budget reductions made by each board while attempting to minimize impact on instructional programs, noted the benefit of working together “to achieve efficiencies and economies of scale,” and concluded by committing to collaborating with other districts in the county to explore opportunities for consolidation of services and also to meeting jointly with the neighboring district (Willow Run and Ypsilanti respectively) “for

the purpose of identifying areas of consolidation and shared public school services in order to provide a high quality education for all students in our community” (Resolution--archives). The resolutions were passed by both boards prior to the August 24, 2011 joint meeting and paved the way for the historic convening.

First Joint Board Meeting

Members of both boards arrived at Welch Hall, location of the Eastern Michigan University Board of Regent’s board room, an hour before the joint meeting was scheduled to begin. They gathered across the hall from the board room for coffee, punch, and cookies and a time to get to know one another (see Figure 1). While specific pair/share activities were planned, those did not materialize; individuals were all engaged in conversations, and it seemed that interrupting that for a planned activity would stifle the conversations that were taking place organically. The group included members from both boards, the superintendents from each district, as well as representatives from WISD. The president of Eastern Michigan University stopped in to address the boards prior to the joint board meeting. This was an unplanned but pleasant surprise and added to the feeling that what was about to take place was important for the community, not just the two districts.



Figure 1: Photo from the Social Hour

Pictured from left to right: Dedrick Martin (YPS Supt), Bobby Stevens (WR board), Representative Rutledge, Andy Fanta (YPS board), Kira Berman (YPS board), and EMU President Dr. Susan Martin

A flyer announcing the meeting included the logos from both districts and was titled “Exploring the best of both worlds.” As board members transitioned from the pre-meeting location to the boardroom across the hallway, individuals from the community had

been trickling in for some time. A sizeable crowd of sixty plus filled the room by the time Greg Peoples called the joint meeting to order. The board presidents from Willow Run and Ypsilanti both believed it would be helpful to have this initial meeting facilitated by the WISD, and Mr. Peoples had established credibility to serve in this capacity. Not only was he the WISD board president, he was also the Ombudsman for Eastern Michigan University, a former Willow Run school board member, and long-time resident in the Ypsilanti area. Mr. Peoples recalled,

We specifically tried to get a neutral territory to bring up the initial talks about that [consolidation] because it was very important for both sides to realize that one group was not going to supersede the other, one group wasn't going to take over the identity of the other. And so we held it at Eastern Michigan University, in the boardroom at Eastern Michigan University, so that both boards and, there was a lot of work done and orchestrating how the boardroom was set up so that both boards were set up front, both boards were equal, had equal seating [see Figure 2]. And so I chaired the meeting as the ISD president, and to promote the discussion of the opportunity.

(personal communication, February 11, 2016)

Additionally, the nature of the location and environment in the EMU boardroom elevated the sense of importance of this historic convening. Ms. Lisicki recalled, “I remember that first meeting...at Eastern, actually being



Figure 2: Photo of First Joint Board Meeting
EMU Board of Regents boardroom—board members were seated in alternating fashion rather than separating them by district in an attempt to portray the effort to move forward together.

exhilarated. It was like we were doing some groundbreaking work.” In thinking about the feeling in the room Mr. Garrett noted,

So it’s funny, when we had the big meeting, you know, all the people that’s gonna be there. You start hearin in the streets, and you know, this certain people gonna come here and they gonna oppose this—certain people may come here they’re gonna agree with it. And you’re up in the front and you’re wondering when the comment section takes place, ok, who they gonna talk about today and why they gonna do this and why they gonna do that. So you get up there with all that in your mind—your thinking about it—and when the meeting took place, to my surprise, it’s probably one of the most smooth, smoothest I’ve ever been in because the way it was constructed. I believe Mr. Peoples did a good job in what he did. Having Representatives there was great, also, because they, you could tell that everybody was behind it and I think that kind of made, not necessarily squashed, but those people who wanted to speak out kind of like—ok, maybe we shouldn’t do this because this is not the right place.

(personal communication, February 22, 2016)

There were two action items for board consideration. The first resolution (Appendix D) reiterated the commitment to work together, noted areas of shared services currently in operation, and called for the creation of a joint task force for Collaboration and Communication that would include two board members from each district, as well as superintendents and staff from both districts. The resolution also specifically called on the task force to be facilitated by the Washtenaw Intermediate School District and for quarterly reports to be prepared for both boards and Representative Rutledge. The second resolution (Appendix E) officially appointed two board members from each district to serve on the joint

task force. The resolutions were passed unanimously by both boards with only one member from Ypsilanti not in attendance.

The list of those who spoke at the conclusion of the meeting is indicative of the community interest and support at the launch of this joint effort. The following individuals spoke during public comment: State Representative David Rutledge; County Commissioners Roland Sizemore, Ronnie Peterson, and Dan Smith; Superintendent Ellen Bonter (Lincoln Consolidated Schools); Dr. Jann Joseph (EMU, Dean of the College of Education); Angela Barbesh (President of the West Willow Neighborhood Association); Dr. Joe Yomtoob (former Willow Run superintendent); Shoshanna Demaria (President of the Ypsilanti/Willow Run NAACP and NAAPID); Russell Olwell (Director of the EMU GEAR Up program); and Kelly Powers (Ypsilanti Education Association president). In addition to congratulating the boards on taking this historic step, the commenters “encouraged them to collaborate to elevate academic excellence and improve the area’s economic development in conjunction with improved student achievement” (School District of Ypsilanti Minutes of Willow Run and Ypsilanti Joint Board of Education Meeting, August 24, 2011). Representative Rutledge, at the conclusion of sharing his thoughts about this historic occasion, began unbuttoning his shirt, causing some in the audience to wonder what exactly was going on. As he remembers the moment,

After the conversation with the board, in recognizing that people have a tendency to, when they don’t listen to your words, they might look at a picture; so, I proceeded to take off, unbutton my shirt. And I don’t know if people were getting the idea that I was starting to take my clothes off, but what I was wearing under the shirt was a t-shirt where I had printed on the t-shirt a symbol that showed the togetherness

of both of these entities. Now what I told them was that I wasn't taking that t-shirt off until they actually came together. But, in fact, I couldn't follow-through on that promise. But it was a visual way to actually show and demonstrate the seriousness of the issue at hand and to highlight the real possibility of doing something different and creative that would go to elevating the academic status of the kids in these districts.

(personal communication, January 29, 2016)

At the time, while many business and community leaders were convinced that consolidation of the districts was not only sensible but also necessary, the two boards of education were not quite ready to embrace that outcome at this stage of the joint conversation. One criticism of the joint board meeting was the fact that board members did not get to speak from the table other than approving the joint resolutions. The scripting of the event was intentional by the steering committee in order to avoid the potential for any debates between board and audience members. However, as the meeting concluded, there was a sense of optimism that this was just the beginning of an important next step in addressing the educational challenges in the Ypsilanti area.

Collaboration and Communication Task Force

The primary action item that came out of the initial joint meeting was the establishment of a task force that was charged with investigating potential areas for shared services through collaboration. The committee composition included five individuals from each district (two board members, the superintendent, an education association representative, and one other individual selected by the superintendent). The board presidents served in an ex-officio capacity and the ISD superintendent was asked to facilitate/convene the committee. The process used to consider potential areas of shared services (Appendix F)

was adapted from the Decision-making Matrix used by the Livingston County Collaboration and Communication Committee.

The Livingston County committee, started in 2009, was comprised of two school board members and the superintendent from each of the five districts in the county. The purpose of the committee was twofold: coordinate communication with the general public as districts were all entering times of financial distress and identify opportunities for shared services that would save money, improve outcomes for students, or both. This researcher was part of the process where the decision-making process was established and served as convener of the conversations in Livingston County as well. The signature accomplishment of the Livingston County committee was the decision to implement a regional transportation system through the Livingston Educational Service Agency where four of the five districts opted into the consortium. The decision-making matrix provided a formal guideline for how issues would be considered and recommendations made. The committee itself had no decision-making authority, but the formalized process helped address potential concerns related to the vested self-interest of the districts at the table. By implementing a structured process, the concerns regarding balance of power and control were mitigated and the participants were freed up to fully engage. It was for this reason that the model was recommended by the WISD superintendent to the Ypsilanti and Willow Run school boards for use in the consolidation conversation.

The Collaboration and Communication Task Force met monthly following its creation, with the first meeting on September 19, 2011. Recognizing the history between the two districts and the lack of pre-existing relationships with those in the room, the initial meeting focused on establishing ground rules and group norms and getting to know each

other in order to build a base of trust for the ongoing work of the task force. The group norms included the following: what is said in room stays in the room; agree on what will be communicated; everyone participates and no one dominates; agree to disagree/respect differences of opinion; speak up with opinions/open and honest communication; commit to fully engage and obtain updates from fellow Task Force members, even when unable to attend; remember it is about what's best for kids; use "I" statements; maintain a sense of humor; and engage in no side bar conversations. Mr. Bates recalled the importance of these meetings,

I think that if this had just moved forward simply as a discussion between the school boards it never could have gotten anywhere. Having the separate communications collaborations committee was absolutely crucial and essential to getting the conversation revolving around the things that it needed to revolve around and building credibility for the prospect of consolidating...(personal communication, January 18, 2016)

The meeting agendas highlight the key areas of focus as the conversation unfolded in the fall. Location of the meetings alternated between Ypsilanti and Willow Run, and frequently, light dinners were provided which facilitated the building of relationships among the participants. Each step along the way was deliberate and measured. The discussions were focused on shared services, identifying the areas with the greatest potential, and then gathering the necessary data in order to make an informed recommendation to both boards of education. Prior to the October meeting, the members of the task force were surveyed and asked to rank order issues to study (consistent with the first step in the formal process) on a scale of 1–10 with ten representing the highest level of interest. The results indicated the highest levels of

interest in the areas of business services (9.78), transportation (9.38), and universal high school access (9.14), and the lowest categories were superintendents (4.88), food service (6.56), and athletics and maintenance (both at 6.89). At that meeting, the committee also discussed the meeting Representative Rutledge held in Lansing on September 27 and talking points for communication with the boards and broader community. The task force decided to continue the conversation around the top three areas and tasked the leadership to begin the process of gathering data (Step 2 in the process).

When the committee reconvened on November 21, the agenda included updates on transportation, business services, and universal high school access, the three areas being studied. Several more options were presented related to the transportation situation. Dr. Hawkins remembered "one of our early discussions of shared services focused on transportation which subsequently seemed realistic to all committee members. I believe we also had similar discussion about the practicality of centralized purchasing" (personal communication, April 19, 2016). Although both districts were currently participating in the transportation consortium with the WISD, separate bus facilities were being maintained in both districts. In Ypsilanti, the situation required attention because the facility that housed the bus garage was in violation of several Michigan Occupational Safety and Health Administration (MIOSHA) requirements and a significant investment of resources would be necessary to bring it into compliance. At the conclusion of the November meeting, the task force recommended that "each board authorize its superintendent to work together to develop the safest, most efficient and cost-effective way for a shared transportation facility to be co-located as soon as possible" (January 18, 2012 Quarterly Report). Subsequently, both boards considered and authorized proceeding as outlined by the task force.

The other topics discussed at the November meeting included an update on data related to business services such as identifying comparable districts and need for information on the people/job functions within each business office, as well as discussion about universal access for high school, including what exactly was meant by that terminology. A final agenda item, introduced by Dr. Joe, included a discussion about the long-term focus. He passionately outlined a vision for creating a system from 0–21, referred to as Cradle-to-Career on the agenda. In thinking back on this part of the process, Dr. Joe recalled,

At the beginning, I, my feeling was, why you wanna marry two school systems who are both not the winners. They had financial problems. They had student achievement problem. So when you start looking a little bit deeper, you notice that if we do this right we may create a new school system to benefit our kids... I think we had the opportunity to create a school system second to none. From cradle to career. (personal communication, January 25, 2016)

Dr. Joe initially suggested this idea during his remarks at the first joint board meeting.

When the committee came together in December, additional information was available related to various options for co-locating the transportation facilities. These included the Willow Run site, a vacant auto dealership in Ypsilanti, and the cost of renovating the existing Ypsilanti facility. The other areas of study—business services and universal high school—were also discussed at that meeting, but no formal recommendations were ever made regarding those two areas.

In January, the task force took the next big step and formalized two recommendations for each board to consider. The first was “The two school districts enter into a contract to co-locate their transportation operations, staff, fleet and maintenance in the Willow Run School

District with modifications to the Sampson Building to accommodate the additional workers and fleet.” The second recommendation was “The two school districts jointly issue a Request for Proposals to subcontract for a single transportation system that would serve both the Willow Run and Ypsilanti school districts.” The request was for each board to act on the recommendations no later than January 31, 2012 (Quarterly Report, January 18, 2012).

When the committee reconvened at the Willow Run administration building on February 29, the agenda included updates on the transportation work, regarding co-location efforts as well as the RFP process; business services; special education administration; universal high school access; and reporting to the community. It was at this meeting where the committee reached a significant turning point in its charge. While discussing the report to the community, the Willow Run Board president, who was always willing to share his opinion but was not always the loudest voice in the room, shared his conclusion,

And so I ‘member setting at the table just like yesterday. We was over at the Willow Run and, I said “Why not just merge em?” And that started, you know, getting everything in motion, and actually, Mr. Bates brought it to my attention. It was like he thought about it. I don’t know where it came from, but then finally we set down and talked about it and said “Let’s try it.” (personal communication, February 22, 2016)

For months, the task force proceeded methodically in following the process the boards adopted in August; and although recommendations were made that met the criteria for saving dollars while maintaining or improving outcomes for students and which were mutually beneficial, it was becoming increasingly clear that none of the areas being studied were sufficient, in and of themselves, to offset the size of the mounting deficits and none of them

got to the core of the achievement concerns in both districts. Up until the time when Mr. Garrett made that statement, the topic of full district consolidation was not considered in full group conversations. Mr. Garrett's comments opened the door to a fundamental shift in the conversation of the task force and accelerated the discussions regarding bringing the two districts together.

Prior to the March 19 Collaboration and Communication Task Force meeting, the steering committee met with Representative David Rutledge on March 14 to talk about next steps. Representative Rutledge regularly checked in with the two superintendents Lisiscki and Martin as well as with the WISD superintendent to see how things were progressing. He urged the two superintendents to prepare an outline for what a new, unified district might look like. The superintendents, led by Mr. Martin, developed a power point presentation titled *Willow Run/Ypsilanti: A conceptual design to create a new educational system by unifying two districts into one. The goal is to develop a high quality system of learning communities*. Ms. Lisiscki remembered:

I will tell you that that was Dedrick's brainstorm. He actually created that. He was the one that said this is what it needs to look like, will you look at it and then we went from there. It was in draft form, and we were just kinda creating it and adding things or taking things away from it... I do know it was important to let everyone know that this was serious and that we were going to move forward and this is what we can do.

This is what we can make it look like. (personal communication, January 15, 2016)

The meeting on March 19, held at the Ypsilanti administration building, represented a key moment in the consolidation conversations. The first item on the agenda was a review of the meeting with Representative Rutledge. Following that overview, Superintendents Martin

and Lisiscki walked the committee through the power point presentation that represented what could be possible if the two districts came together. The task force members engaged in dialogue throughout the presentation as the various areas were discussed, including balanced calendar, combination of programs in order to maximize use of facilities. After the presentation, there was a review of the decision-making process that both boards adopted in August. Although the issue of district unification was only formally named at the February 29 task force meeting, the data presented was sufficient for the members of the task force to conclude it was time to move from tinkering at the margins and to recommend:

The Ypsilanti and Willow Run Boards of Education place the question of school district consolidation on an upcoming ballot, predicated on the development of a solid, detailed unification plan with specific legislative and financial incentives in place to support it. And, further that this recommendation is to be discussed at a public, joint board meeting to be held on April 16, 2012 at 7 p.m. at a location to be determined. (Collaboration and Communication Task Force Recommendations/Key Points, March 19, 2012)

This was the first time the consolidation conversation shifted to the term “unification.” This is a distinction that makes a difference. As noted in Chapter 4, the idea of consolidating the two districts surfaced numerous times since the establishment of the Willow Run Community School district in 1944. None of those conversations gained enough traction to get out of the starting gate. Now, in the spring of 2012, something was different. The board presidents from the rival districts launched a conversation, facilitated by a third party, that was based on trust, transparency, open communication, and most importantly doing what was in the best interest of the students in the community. Consolidation was a

convention of law (MCL 380.851-380.871 of the Revised School Code); unification represented agency on the part of the larger community that included both school districts. It reflected intentionality about creating a desired future that could not be captured in the language of consolidation. Mr. Bates framed it this way:

One of the things that I realized early on is it was gonna be you had to have a much bigger vision than just the consolidation. The consolidation had to be a means to an end, not an end. If you were going to get buy in on both sides, you needed to have everybody be able to see something bigger, more important, and better for kids than just the fact that we were consolidating. And I think that for us, the approach that was imagined from our work with the ISD, where we first established a community committee, and the communications collaboration committee, was absolutely brilliant because there was a way to bring together skeptical leaders in the community as well as progressive leaders in the community and try and begin to reach a common vision of what our kids deserved. (personal communication, January 18, 2016)

Efforts in Lansing

During the time the Collaboration and Communication Task Force was meeting, Representative Rutledge was working behind the scenes in Lansing in order to secure support for the consolidation and address many of the pressing challenges and obstacles related to bringing the two districts together. He convened a group of key individuals in Lansing on September 27, 2011. The purpose of the meeting was to discuss Strategies to Address Challenges for Struggling School Districts in Washtenaw County (Appendix G—note that while this document is listed as “confidential.” Because of the time lapsed, Representative Rutledge provided permission for its public disclosure in this dissertation). This was the first

of several significant meetings with state-level actors to layout the nature of the challenges and opportunities associated with bringing these two districts together. Those in attendance included several key individuals from the Michigan Department of Education, two state Representatives, Bill Rogers and David Rutledge, and the Governor’s strategic policy officer, Bill Rustem. At the meeting, Representative Rutledge and Superintendent Menzel reviewed the current efforts and data related to efforts in both districts that were already in place to tackle the financial concerns. Obstacles to moving forward were identified, with one of the most significant ones being the large deficits in both districts. Mr. Rustem’s comments at the conclusion of the meeting notes were cause for encouragement when he said, “If districts are looking to make major changes to improve and consolidate, then state should be willing to help make it happen.”

In March, Representative Rogers, who was chairing the K-12 appropriations committee, and Representative Rutledge participated in conversations regarding legislative support for the consolidation effort. Representative Rogers expressed a willingness to work with Representative Rutledge on the specifics. He recalled,

What happened was the Representative for the Ypsi Willow Run area approaching me and Scott Menzel approaching me—as he used to work at the LESA, here in Livingston County where we built a relationship—saying “we’re looking into some things, would you consider speaking with us” and “we wanna throw something by you as we were moving along with the budget.” (personal communication, January 15, 2016)

Carol Wolenberg, Deputy Superintendent of the Michigan Department of Education at the time of the consolidation noted:

2 key legislators were not only involved but took on the project and did all that they could to help it succeed (i.e. changing the foundation allowance, coming into the community, talking to their various committees and engaging the Governor's Office). These are critical policy makers who can make things happen and if there's no support there then it probably won't work. I remember many meetings called by Rogers and Rutledge that also included the Gov's people. I also think that having Mike (State Superintendent) and me involved from the get go helped because we wanted the process to succeed and devoted staff and resources to the effort and tried to keep the typical bureaucracy at a minimum. (personal communication, February 16, 2016)

The idea of having the right people working behind the scenes in Lansing was critical to the overall success of the effort and reflects the importance of policy entrepreneurs willing to act as the policy window opens (Kingdon, 2003). As the date of the second joint board meeting drew closer, the leadership of the two districts recognized that it was important to formalize the state-level support.

On April 9, board presidents Bates and Garrett, superintendents Martin, Lisiscki, and Menzel, traveled to Lansing for a meeting at the Michigan Department of Education. Initially, the group understood they would be meeting just with the State Superintendent Mike Flanagan. However, when they arrived at the Hannah Building and were escorted up to the fourth floor, they were ushered into the board room where State Superintendent Flanagan invited his entire cabinet to sit in on the conversation. When asked about the rationale for including the entire cabinet, Superintendent Flanagan commented,

I wanted to make sure that all of you at those levels—at the local and the intermediate—understood this was important to us and wanted my own team, frankly, to not mistake this for just some, you know, occasionally you have in the nature of the beast, you have a token meeting—and I mean that respectfully, but you just, there’s no way to say “no”—... well this, I wanted to make sure, wasn’t seen as that. And that’s why I think I had all the parties involved and then asked them to be looking in all their tool boxes... (personal communication, February 9, 2016)

Going into the meeting, a two-page list of talking points was developed in order to ensure all of the key points were addressed. The purpose was “to request assistance from the State Superintendent of Public Instruction related to the potential consolidation of two deficit districts that also have two school buildings on the Persistently Low Achieving (PLA) list.” The talking points included the history of the conversation starting with the joint board meeting in August. The group discussed the Collaboration and Communication Task Force and the recommendations that emerged as part of that process. However, the group also noted,

Both boards have already taken steps to co-locate transportation fleet and maintenance facilities; share programs (Junior ROTC); share staff (have recently posted a shared director of special education); concessions have been made by bargaining units in both districts, but the decline in enrollment coupled with the reduction in state funding result in a “death spiral” that requires such draconian measures to balance the budget that education for students will be severely compromised.... We recognize that merging two deficit and underperforming districts, doesn’t (in and of itself) solve anything. However, the commitment of both boards to

reimagine education in order to tackle the pressing challenges does represent a tremendous opportunity. (talking point notes, personal files)

There were targeted requests after the situation was outlined as noted above. Specifically, the group asked for an extension on the repayment period of the deficits. Typically, the department required deficit elimination plans to detail how the operating deficit would be eliminated in a two-year period. This would require such severe measures that a newly consolidated district would be unable to implement a competitive and viable educational program. The group also noted the need for funding—possibly from the Governor’s proposed \$10 million—to help with the cost of the merger. Finally, there were three legislative items that were put on the table: extending the repayment period to twenty years, with 0% interest but accountability measures built in; implement a moratorium on any new charters in the boundaries of a consolidated district for three years; and specifically designate at least \$2 million to support districts that consolidate in the 2012—13 school year. Before the group departed, they indicated it would be helpful to have a letter from the State Superintendent “expressing his willingness to exercise his authority to provide waivers *if* the two school districts actually vote to consolidate.”

The meeting was well received. Superintendent Flanagan commented, “But I just remember that the key was making this one work...from my point of view I just remember thinking, ‘this has to work.’” On April 10 a letter from the State Superintendent was sent to the board presidents outlining his support for the effort. In his letter he commended the two board presidents and boards of education for their “trailblazing efforts” and noted that the conversations regarding a new unified district were “visionary and takes tremendous courage.” (Letter from Flanagan, April 10, 2012). With the support of the State

Superintendent secured, the two boards came together for a second time to take the next step on the journey.

Second Joint Board Meeting

The site of the second meeting was the Ypsilanti Township Civic Center board room, selected because it was also viewed as a neutral location. The configuration of the board room created a different feel compared to the initial meeting at Eastern Michigan University. There were insufficient seats to accommodate all fourteen board members and the superintendents at the same table, so the boards were split on two-levels in a semi-circle in the back and a straight table with some board members on a lower tier than the others in the front (see Figure 3). The audience was seated in an auditorium and 105 individuals signed in, not including board members and superintendents.



Figure 3: Photo of the Second Joint Board Meeting

Members of the joint boards along with superintendents: back row from left to right—Gregory Myers (WR); Ellen Champagne (YPS); Kristine Thomas (WR); Dedrick Martin (YPS Superintendent); David Bates (YPS); Don Garrett Jr. (WR); Laura Lisiscki (WR Superintendent); Kira Berman (YPS); Scott Menzel (WISD Superintendent). Front row from left to right—Linda Horne (YPS); Bobbie Stevens (WR); Ed Jackson (YPS); Marke Wilde (WR); Sarah Devaney (YPS); Brenda Meadows (WR); Andy Fanta (YPS); Dorothy Stewart (WR)

The agenda for the meeting was scripted, much like the first meeting. The Air Force JROTC color guard presented the colors and led the participants in the pledge of allegiance. Board presidents Garrett and Bates provided a synopsis of the work that transpired subsequent to the first joint board meeting, and Mr. Bates read the letter from State Superintendent Flanagan. A resolution was reviewed that called for the boards of education

to proceed with placing the question of unifying the districts to a vote of the people following the development of a

clear and detailed plan with broad participation for the development and implementation of a unified education system that is adequately supported by specific legislative and financial incentives so as to reasonably ensure the achievement of rigorous academic standards for all students and the financial viability of the new district. (Appendix H)

The draft resolution was amended at the table to emphasize that the two communities and boards would collaborate in development of the plan. When each board voted, the first hint of opposition emerged. The Willow Run board voted 5–2 in support of the resolution while the Ypsilanti board voted 7–0. The reasons for the two “no” votes were not shared publicly from the board table, but one Willow Run trustee who voted in support noted that the action of the boards was not a vote to consolidate but rather to “probe deeper into the benefits of consolidation and to ensure that consolidation is in the best interest of both districts” (Minutes of the joint board meeting). In the *Ann Arbor News* coverage of the event, reporter Danielle Arndt noted, “The effort really is a first for the state of Michigan in the era of Gov. Rick Snyder’s emergency manager law” (April 2012). She went on to highlight out the appointment of emergency managers in four districts during the previous six-month time frame and suggested the consolidation effort was a way to possibly avoid that fate for the two east-side districts where the deficits stood at \$1.7 million for Willow Run and a projected \$9.4 million for Ypsilanti.

During the call to the public, Representative Rutledge again addressed the boards. He commended them and their leadership on the progress that was made since the first joint

board meeting. He specifically noted that “each district’s history should be respected and preserved” (minutes April 16, 2012). During his comments, Representative Rutledge also reflected,

I think of this like, sometimes things out of our control happen. They converge on us like a perfect storm. But, sometimes that storm will destroy things but create an opportunity to have new buildings, just a new landscape. And that’s what I am certainly hoping will come out of this process. (Arndt, April 2012–video)

He concluded by expressing his desire to work with state officials in securing financial support should the districts decide to move forward with consolidation. Several other community members addressed the board. There were both comments and questions, ranging from specific details such as “How will this impact transportation?” and “Which buildings will be closed?” to more generic questions about the data necessary in order to make an informed decision. One member of the community (a 1958 graduate of Ypsilanti High School) addressed the boards and pointedly suggested that any board member who served for more than ten years on either board should resign. This was because the districts did not find themselves in the current position overnight, and the thought was board members who contributed to the demise should not remain in their positions. He stated “If both boards drove the bus in the ditch, I don’t think once they put their glasses on, unless they was very bad sighted, they gonna be able to drive it out” (Arndt, April 2012–video). There was a range of emotions in the comments from the public, some in support, some against, and many with a plethora of questions they wanted answered before the districts decided to proceed. The excitement of the initial meeting was not present for this one. The body language and facial expressions of audience members were serious, although Dr. Joe was able to get them

to laugh in his comments to the board when he noted the financial and academic stress of both districts and asked, “Why you want to marry two couples with problems.?” He then turned their attention and the overall focus on the future stating,

There should be a dream out there. You make lemonade out of lemon. We don’t care what the state does to us. We overcome that...I am glad to see that in this statement, in this resolution, we are talking about education our kids from zero to post-secondary. Nowhere else have it. You could create a school system that nowhere else take care of all their kids. (Arndt, April 2012–video)

After the boards passed the resolution, superintendents Martin and Lisiscki outlined the next steps in the process, including a commitment for broader levels of community engagement in the development of a unification plan. This was another seminal moment in the journey. The boards of education could have backed away from the conversation, noting that it was all happening so quickly or they could have acquiesced to community concerns about bringing the two rival districts together; concerns about loss of identity and history. Instead, they took the courageous step of continuing to move toward a new vision for public education in the Ypsilanti area.

Summary

During this phase of the consolidation process, a few key lessons began to emerge. First, from the beginning the engagement strategy with boards was designed to build trust and facilitate relationships between leaders in both communities. The process for making recommendations for action, adopted by the boards and utilized by the Collaboration and Communication Task Force, ensured that the conversations were issue-focused and served to help neutralize the more emotional aspects of shared service and consolidation conversations.

A second emerging lesson was the importance of engaging key leaders at all levels—not only locally with respect to board and administrators, but also at the state level. The behind-the-scenes work, often invisible to the Ypsilanti and Willow Run communities, served as a necessary component in securing the consolidation grant as well as other supports along the way.

Finally, the shift from shared services and cost savings was a product of a number of factors including recognition that none of the issues being studied for shared services could produce the kind of savings necessary to eliminate the deficits, and they did not fundamentally address the academic challenges of both districts. Both districts had submitted Deficit Elimination Plans (DEPs) and the reductions that were called for required significant sacrifice. However, the negative variables and aspects of the conversation shifted in March of 2012 to contemplation of what might be possible if the districts came together to create a unified district. One of the articles that was shared with the Communication and Collaboration Task Force during the conversations prior to the April joint board meeting was titled “District Consolidation: Rivals Coming Together,” published in the *School Business Affairs* magazine of the Association of School Business Officials (Mart, 2011). The author led the consolidation efforts of two small districts in Iowa and many of the lessons learned outlined in the article informed the process for the Willow Run and Ypsilanti conversations. Ultimately, when people began to think about what was possible and how consolidation represented an opportunity to hit the reset button, a new energy and vibe began to surface throughout the community. As the spring transitioned to summer, so the conversations moved from collaboration and shared services to unification and the possibility of a better and brighter future—one made possible by reimagining what a unified school district could be.

CHAPTER 6: ENVISIONING A SHARED FUTURE

I thought our dream was [a] good dream....I think we had the opportunity to create a school system second to none. From cradle to career.

—Dr. Joe Yomtoob

The decision of the two boards to engage in collaborative work with both communities to develop a plan for unification represented a significant leap forward for consolidation. While the idea that the two districts might ultimately become one existed in the minds of many of the board members and leaders from the time of the initial conversation, most did not anticipate that the conversations would shift so rapidly from shared services to full consolidation. The reasons for this shift are significant and constantly served as a background for all other conversations. This included the economic reality and the recognition that the shared services cost savings were insufficient to address the financial crisis both districts were experiencing. In addition, the looming possibility of the appointment of an emergency manager and/or loss of control of the high schools through re-assignment to the Education Achievement Authority weighed on the minds of not only school district administrators and board members, but also frontline staff and members of the community who loved their schools and were loath to see the state impose a solution. Mr. Bates provided the following framing in an interview with the *Ypsilanti Courier*:

There are those that say that it is impossible to build a world class school district from the financially crippled institutions that now serve our children. They don't know who we are. Impossible is just a big word thrown around by small people, who find it easier to live in the world that they've been given, than to explore the power they have to change it. Impossible is not a fact, it's an opinion....and aren't our children worth trying to achieve the impossible? (Marshall, 2012)

Following the April joint board meeting, the next phase in the consolidation process began to unfold. The initial conversations during the first ten months were methodical and deliberate. The next two sub-phases of envisioning a shared future and the campaign leading to the vote beginning in May of 2012, were characterized by a new intensity and increasing levels of community engagement. This chapter will include a review of the visioning process, including the expanded Collaboration and Communication Task Force, legislative and policy developments, communication and engagement efforts, and a final recommendation from the task force to place the consolidation proposal on the November 6, 2012, ballot resulting in the third and final joint board meeting in August of 2012.

The steering committee convened on May 1 to outline the process for developing the detailed plan for unification. The agenda included a debrief of conversations subsequent to the joint board meeting on April 16: an outline of the process for community engagement including the following elements—sense of urgency, constant communication, vision process, identification and engagement of key community leaders, legislative support, regulatory relief, and a timeline for completing all necessary components of the process; potential funding for the work; key areas of the draft plan, including instructional focus on birth through post-secondary, staffing, and finances; data gathering; and a discussion regarding next steps and the agenda for the May 21 Collaboration and Communication Task Force meeting. The role of the WISD in facilitating this work was also discussed. A two-page document titled “Pathway to Unified Education System of Excellence” was developed and served as an outline of the work as well as a request for interested consultants to contact Dr. Shivers at WISD. During the steering committee meeting, reference was made to JFK’s *Profiles in Courage*. The conversation up to this point required vision and a willingness to

accept the challenge, but there was recognition that the shift from discussing shared services to creating a detailed plan for unification represented a greater degree of risk and difficulty than had been undertaken previously. The reference to *Profiles in Courage* was intended to remind the participants that history includes individuals who made courageous choices, and that not all of those stories had a happy ending for the individual—sometimes there was an individual price to pay for the courage to take a principled stand—but the overall outcome was better because of those courageous individuals. Each member of the steering committee was encouraged to read the book as a source of inspiration for the work ahead.

When the Collaboration and Communication Task Force convened on May 21 at the Willow Run administration building, a new agenda was in front of them. The task now was to respond to the board call for a collaborative effort between the two communities and boards to develop a detailed plan for unification. While the previous meetings of the task force had not been posted “public meetings,” there was a realization that transparency and inclusion were important aspects of the process. Additionally, a decision was made to add members to the task force in order to expand perspectives at the table. For example, the lack of participation by some groups was mentioned during the April joint board meeting by the union leader for the Ypsilanti support staff. The newspaper also took an active interest in the process, and an article comparing the two districts (and what each brought to the table) was in the June 11, 2012, edition of the *Ann Arbor News* (Arndt, June 2012) and contributed to increased community awareness of the conversations.

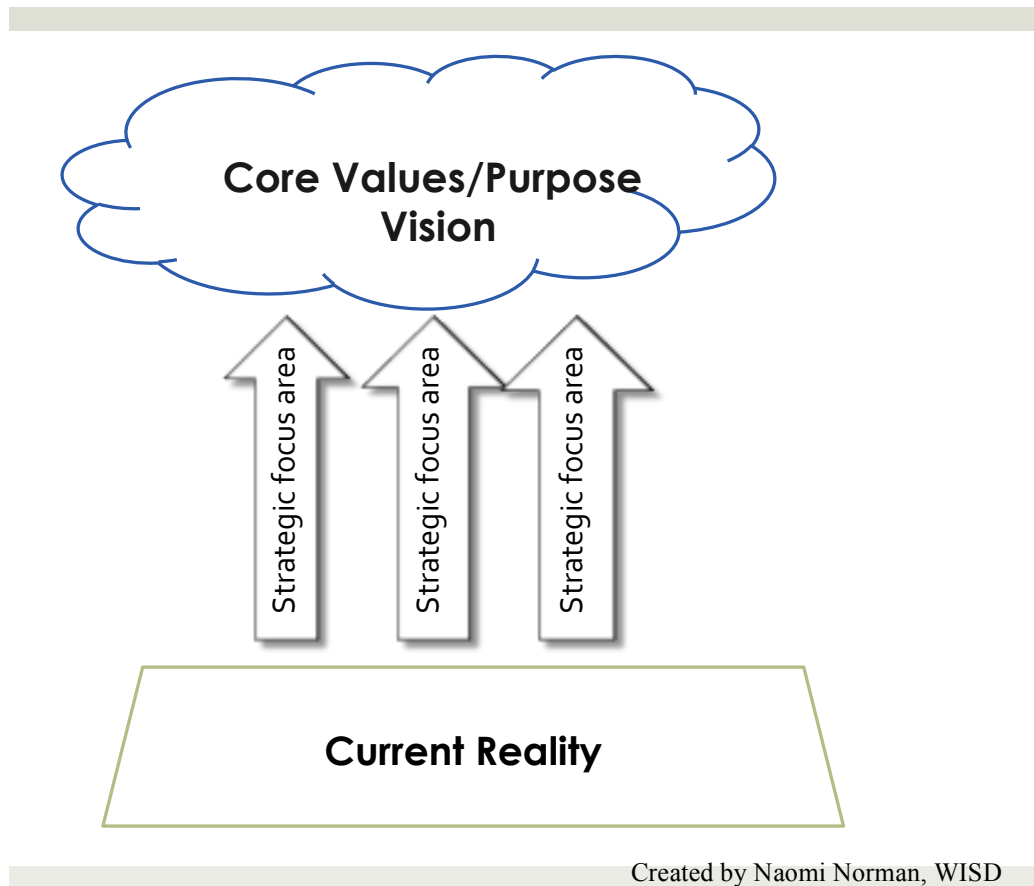
Community organizations and leaders were also interested and engaged in this conversation. As the WISD was looking for a consultant to assist in facilitating the visioning work, funding for the project was provided through donations from the United Way of

Washtenaw County, the Ann Arbor Area Community Foundation, the Eastern Leaders Group, and Eastern Michigan University. Even though the funds raised did not cover the total cost of the consulting contract with the Leadership and Learning Center, the investment by community partners signaled support in a way that attendance at meetings had not. The money was raised primarily because both districts had no additional funds for such a project. Once the consolidation grant was awarded, the cost of the facilitation that was not covered through local support was reimbursed to the WISD and the two local districts.

Preferred Futuring—Design Process

Although a consultant was selected to assist with the visioning work, that represented only one part of the overall design process. As the designated third party facilitator, the Washtenaw Intermediate School District had staff members who were skilled in facilitating a process known as “preferred futuring,” a process developed by Edward Lindaman and Ronald Lippitt (1979). They noted that “in order to shape that preferred future, we need to hold in our minds an image of what it is that we really want” (p. 3). Contrasted with conventional strategic planning where groups begin with existing data (environmental scan) and develop a plan of action, the preferred futuring process begins with a focus of what it is a group aspires to achieve (vision) coupled with a clear articulation of core values and purpose. Figure 4 illustrates the preferred futuring process. Community members were asked to start by considering the vision, including core values and purpose unencumbered by constraints associated with the current reality. It is only after the vision has crystallized that attention turns to addressing the factors that comprise the current situation. Following a review of the

data regarding the current reality, it is possible to develop strategies in order to move from the current state toward the preferred future.



Created by Naomi Norman, WISD

Figure 4: Preferred Futuring Diagram

The timeline for implementing the preferred futuring process is included in Appendix I with the full list of meetings and locations. The work was structured in three phases: visioning, data portrait, and strategic design. It was configured to afford people the opportunity to attend sessions near where they lived and at various times in order to accommodate work schedules; multiple weekend options were included. A total of six visioning sessions were held with 120 community members participating between June 18 and July 9. Those sessions, facilitated by Naomi Norman, the WISD Director of Achievement Initiatives, with support from other WISD staff, included conversations

designed to elicit thoughts about best and worst possible outcomes of consolidating the two districts. By getting those thoughts on the table, participants were able to see an emerging vision of what was possible while also acknowledging some of the perceived barriers and concerns. For example, one of the most repeated concerns of participants was a “loss of local control of school system.” Participants were also asked to identify the unique strengths of the community, ideal characteristics of a graduate, and ultimately a vision for a new district (Unification Design Plan, July 30, 2012). David Bates, reflecting on this process, suggested:

I think it not unreasonable to say that the success of the consolidation really rode on the successful work of that visioning process, because that was something people could understand and value. It included the values of each of the two communities. It included the hopes and dreams of the parents in the community, and it particularly reflected the makeup, the unique makeups of those communities and where those people were coming from and what their ideas about things were. (personal communication, January 18, 2016)

Mr. Garrett and Ms. Lisiscki noted that while the process was “good,” they were disappointed in the level of participation from the Willow Run Community. Ms. Lisiscki stated:

The part that was frustrating for me... was I had the mouthpieces there, but not as many community folks as they did on the Ypsilanti side. And that just goes back to the trust that they always bestowed in the leadership. But we needed them there so that they were telling us what they wanted for their kids instead of just trusting what it was that we were coming up with. (personal communication, January 15, 2016)

When the Collaboration and Communication Task Force met on June 18, it included significantly more participants, including staff from both districts as well as community members. At the April 16 joint board meeting, Ypsilanti Trustee Andy Fanta enumerated a number of questions he believed were important to answer before deciding to proceed with a consolidation vote. This included identification of which buildings were going to be open and which ones closed (Arndt, April 16, 2012—video). This question surfaced repeatedly throughout the design process, but at the June 18 meeting of the task force, the committee was presented with a framing that pushed back on the desire of some board and community members to have specific answers to the question of which buildings would remain open and closed (personal notes from the meeting). Specifically, an analogy to a construction process was used where school districts typically engaged an architect in a “schematic design” process that offered sufficient detail to paint a picture of what was intended before asking voters to approve a bond request. However, “detailed design” did not commence until after the voters approved the bond proposal. No district has sufficient funds to pay for design detail without certainty that the community supports the project. This same argument was used for outlining the consolidation plans. In the May 21 task force meeting, the agenda included the following related to the visioning process: “Focused on the instructional aspects of a birth through post-secondary system (facilities, staffing, and finance are secondary questions that will be addressed once the educational/instructional vision is framed).” While there was a desire for a determination of facilities that would be used if the community voted to consolidate, the decision was made to focus on the instructional programming and to defer a decision on specific use of facilities until after the community decided whether

consolidation was the direction to pursue. This decision built on the successful process in Willow Run when they closed two buildings as discussed in Chapter 4.

As the process unfolded, not all the voices from the community were positive or optimistic about the process and likelihood of success. Ypsilanti-based blogger Mark Maynard had several posts during the summer of 2012 related to the consolidation conversation. On June 21, Maynard included text from an email written by an Ypsilanti parent and University of Michigan professor with respect to her concerns about the process—as well as how she saw an opportunity to engage and possibly influence the final outcome. She noted,

I think consolidation CAN bring some good, but only if we have visionary leadership at the top. We don't currently have that visionary leadership, which means that a combined district will be the same old same old, but in a much larger, more challenged, form. (Maynard, June 2012)

She proceeded to outline a number of topics that she believed should be addressed in the visioning work—many of which were included in some fashion in the design process. On July 9, 2012, Maynard penned another blog, titled “What the WISD got wrong in the marketing of their Ypsilanti, Willow Run school consolidation plans.” In the blog, he highlighted his concerns with respect to failure to create an interactive process for community engagement. He wanted a more robust website, interactive dialogue, video production, etc. He noted complaints about the “out-of-state” consulting firm and other comments he was hearing in the community (Maynard, July 9, 2012). This blog prompted a request from the WISD superintendent to respond to a number of the items that were deemed to be inaccurate or misleading. To that end, Mr. Maynard agreed to a Q&A in writing with

the WISD superintendent, which was published on July 15, 2012 (Maynard, July 15, 2012).

Mr. Peoples pointed out that one of the strengths of the consolidation approach was listening to all voices:

When we had the community forums, we made it very clear that if you didn't like, if you weren't in favor of it, you should share that. And people were able to share their frustration and anger and you know; we took all that in. We factored that in, and we wrote those notes down, and when the notes came out all that was in there. (personal communication, February 11, 2016)

Following the visioning sessions, the Data Portrait was presented to the Collaboration and Communication Task Force on July 10. This document included a general overview of the history of the two districts; demographic data, including enrollment trends; test scores; financial data; graduation and dropout information; and post-secondary aspirations and attainment of the two school districts. The lead consultant from the Leadership and Learning Center participated in the July 10 meeting in order to begin to understand the overall context for the two-day strategic design workshop later in the month. Three additional community meetings were held to review and discuss the data portrait and approximately sixty individuals participated in those sessions.

At the conclusion of the meeting on July 10, the two board presidents, along with two superintendents, Dr. Joe, and the WISD superintendent went to a local restaurant in Depot Town, Ypsilanti for dinner to process next steps. While the two board presidents initially were planning on taking the expected recommendation of the task force to their individual boards for a vote, the superintendent of WISD suggested that in order to remain consistent with the process which started back in August of 2011, they should consider having a third

and final joint board meeting. The group agreed on this strategy and identified August 8 at 7 p.m. as the preferred time (personal communication to WISD Board).

The following week on July 18 and 19, a two-day strategic design session was held that included a cross-sector of community and school leaders—82 people in total—at the Washtenaw International High School cafeteria. July in Michigan can often be hot and humid, and these two days were no exception. Crammed into a modest-sized cafeteria on the first day, community members sat in groups and engaged in intensive planning around the core values and components of a new unified district. Facilitated by a consultant from the Leadership and Learning Center in partnership with the WISD team, the structure of the sessions included time to learn about other communities with similar demographics that were able to achieve better outcomes for students as well as time to craft strategic design components for the new district. On the second day, groups separated into classrooms and other spaces to work on the five key design elements. Many key leaders participated in the session. In addition to staff and parents from the two school districts, members of the community—including clergy, former students, and representatives from Washtenaw Community College and Eastern Michigan University—were in the room as committed partners. Several members of the Eastern Leaders Group participated and indicated a clear understanding of the importance of the educational system to their overall goal of revitalizing eastern Washtenaw County.

The culmination of the visioning sessions, data portrait dialogues, and strategic design conversations was the identification of seven core values and five core pillars for the new district. While these are not necessarily “new” concepts, they constituted the

fundamental structure around which specific details could be established if/when the community voted to approve the consolidation proposal.

The presentation of the results of the unification plan included the following statement of the vision: *Creating an educational system designed to meet the needs of children from birth through college and into careers, with students who appreciate the history and diversity of their community and who are prepared to become responsible citizens* (Keynote presentation July 30, 2012). The core values, identified as “non-negotiables” for all aspects of the new district were the following:

- High expectations for all students
- Embrace diversity and develop cultural competence
- Learning is the constant, time is the variable
- Student voice and engagement
- Vibrant community and family partnerships
- Honor culture and heritage while preparing for 21st century
- Respect

The Five Key Design Elements (prenatal through kindergarten entry; high quality teachers and teaching; effective leadership at all levels; culture and climate conducive to learning; and every student graduates with college credit and/or a career credential) represented the building blocks of a new, unified district. The work was based on a review of successes in other parts of the country and focused on whole system redesign rather than just looking at parts of the system. There was recognition that the two school districts, although they had pockets of success, were not producing the kind of results that parents and community aspired to for their children. Superintendent Martin framed it as follows: “The

reality is if we solve the money problem, morally are we happy with where we are academically?” Martin said at last week’s consolidation framework meeting. “And we are saying, ‘No, we’re not.’” (Shaw, August 2012). Accordingly, the building blocks reflect a systems approach from Cradle to Career.

Figure 5 is the visual that was used to explain how the key design elements were conceptualized. The prenatal through kindergarten entry focus was seen as the foundation—an essential key to changing the life trajectory for young people and addressing academic concerns by ensuring kindergarten students entered school prepared to be successful. The return on investment of early childhood efforts is well documented in Perry Preschool and Abecedarian studies, and the Perry Preschool study took place in Ypsilanti. This historical link to high quality early childhood education created an opportunity to build on a strength, but also focus on strategies that addressed the current issues throughout the Ypsilanti area.

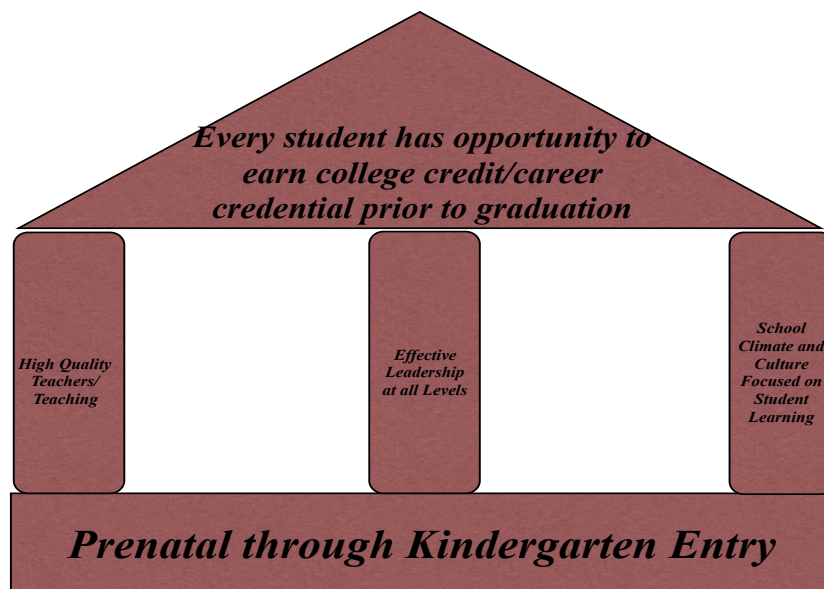


Figure 5: Key Design Elements for a Unified District

The next three design elements were considered essential support structures that crossed all aspects of the cradle to career continuum. The first was a focus on high quality teachers and teaching. Research abounds related to the impact of high quality teachers on student achievement. The financial conditions of the two districts made attracting and retaining top talent a challenge, but the subgroup also believed that it was important not only to recruit but also to provide support for teachers in implementing culturally proficient, evidence-based, instructional practices.

The third key design element was effective leadership at all levels. The subgroup that addressed this challenge embraced an operational definition of leadership as “moving people from where they are to a better place” (Unification Design Plan, July 30, 2012). The participants reflected on formal and informal leadership, recognizing that it was more than just the positional leaders of board, superintendent, principals. Consideration was given to situational leadership as well as the importance of having a vision that was shared by the larger community, not just “embodied in a single person as the leader.” The importance of courageous leadership in addressing the challenges of the district was emphasized and the recommendation concluded with identification of some of the traits of effective leaders.

The fourth design element addressed a positive culture and climate focused on learning. This group took into consideration three core areas related to building a positive culture and climate: student empowerment and civic-mindedness, teaching social skills and cultural responsiveness, and the whole child. Throughout the summer conversations, one of the topics that continued to emerge was the perception of unsafe learning environments, discipline problems, etc. This design pillar emphasized the importance of strategies that were cross-cutting and included not only staff, but also parents, and the community in

creating an educational environment conducive to learning.

The capstone or final design element was giving students the opportunity to earn college credit and/or career credential prior to graduation. The data with respect to college entry and persistence was one of the troubling aspects of the current system. As a result of partnership opportunities with Washtenaw Community College and Eastern Michigan University, it was believed that the new system could ensure that every student graduated with some college credits and/or a career credential. Washtenaw Community College specifically committed to establishing dual enrollment opportunities. By ensuring students were prepared to transition from the traditional education system into productive adult lives, leaders in the community began to see connections between this redesign and the overall efforts to revitalize eastern Washtenaw County.

The draft unification plan concluded with the following preliminary recommendations—quoted at length here in order to capture the full significance of this effort:

The citizens of the Ypsilanti and Willow Run School Districts have an unprecedented opportunity to hit the “reset” button and create an educational system that will meet the needs of children and families from birth through post-secondary education (cradle to career). While such a vision may seem impossible given the current economic and academic challenges, success stories from around the country in districts with similar demographics coupled with the support pledged by key leaders (State Superintendent of Instruction, State Representatives, local community leaders) provides reason for optimism.

As representatives from both districts gathered during the course of the summer to consider what a new district might look like, a clear picture emerged of seven core values and five essential domains that serve as the framing, non-negotiable aspects of the new district. At each meeting people began to exude a sense of hope and optimism as the conversation turned from what else needed to be cut in order to balance the budget to what can we create together if the community decides to step up and tackle this challenge.

The path ahead is not an easy one, but the future of the 5,300 students who are currently enrolled in these two districts is dependent on the community identifying a positive path forward. Ours is a community with a rich history of innovation (think Elijah McCoy) and “can do” attitude (think “Rosie the Riveter”). Rather than allowing the state to appoint an emergency manager to impose solutions on the community, we recommend that the voters be given the opportunity in the November 6, 2012 election to decide the fate of public education in these two districts by voting on the question of consolidation. To that end we urge the boards of education of the Ypsilanti and Willow Run School Districts to vote on August 8th to place the question on the November ballot. (Unification Design Plan, July 30, 2012).

This plan was reviewed by the Collaboration and Communication Task Force and led to the resolution urging both boards to proceed as outlined above.

Emerging Community Support

On July 10, 2012 the Ann Arbor/Ypsilanti Chamber of Commerce, which only a few years earlier went through a consolidation process bringing together the separate Ann Arbor and Ypsilanti Chambers of Commerce, issued a statement of support for the effort: “This

merger aligns with the A2Y Chamber's longstanding advocacy of innovative cooperation, collaboration or consolidation between governmental units whenever and wherever appropriate, especially when such actions have community support." The statement outlines specific reasons for supporting the effort and concludes by urging the two school boards to place the consolidation question on the November ballot. One week later, following a meeting with Superintendents Martin and Menzel, the Minister's Alliance of Ypsilanti, Ann Arbor & Vicinity voted unanimously to go on record in support of the merger: "It is the opinion of this organization that consolidation is in the best interest of students, members, and the school districts of both communities" (Letter to Dedrick Martin, July 7, 2012). The letter concludes by offering their willingness to speak publicly in support of the effort. Importantly, the Willow Run/Ypsilanti branch of the NAACP and the Eastern Leaders Group also formally signaled their support for the consolidation effort.

During the summer months, several meetings were held with community groups in addition to the formal conversations related to the design process. The superintendent of WISD, along with the WISD director of communications and public relations, met with the "coffee club" on July 9. This is a group of mostly retired men who gather daily during the week at Tim Horton's on Michigan Avenue and discuss a range of topics over coffee. According to one of the members, the club began in 1934, and there were a couple of members now in their nineties who began attending when some of the founders of the club were still alive. They had a tremendous sense of history of the community and of the two school districts and asked critical questions. After more than an hour of conversation, many of the individuals expressed support for the consolidation effort (personal communication to WISD board). On July 30, Superintendents Martin, Lisiscki, and Menzel presented the

unification plan to the Ypsilanti Rotary Club. This was the first time the presentation was shared publicly. On August 1, the WISD superintendent and WISD communications director met with a group of retired Ypsilanti school personnel at the Bomber Restaurant, a location steeped in history and frequent breakfast gathering place for many locals. The conversation revolved around why the consolidation was necessary. These were individuals who cared deeply about the school district and the future of education in the area. By the conclusion of the meeting, the participants acknowledged understanding why the consolidation was necessary. Later that day, Superintendents Martin, Lisiscki, and Menzel participated in a radio interview at WEMU, the local public radio station, to talk about the efforts. The commitment to open communication and transparency included saying “yes” to any group that was willing to have the conversation and learn more about the unique issues and challenges the two districts were facing, along with a possible solution for moving forward.

Legislative and Policy Developments

As the preferred futuring process was taking place, the behind-the-scenes work in Lansing continued. On Thursday, June 28, another meeting took place in Lansing as a follow up to the first meeting in September with a focus on “Strategies to Address Challenges for Struggling School Districts in Washtenaw County.” Among those in attendance were Representatives Rutledge and Rogers; Bill Rustem and Greg Tedder from the Governor’s office; and Carol Wolenberg, Glenda Raeder, and Lisa Hansknecht from the Michigan Department of Education along with the WISD superintendent. The tone of the meeting was positive and the individuals in the room signaled their support for the consolidation effort, including Representative Rutledge’s idea for a bill that would place a three-year moratorium on the opening of a charter school within the boundaries of a newly consolidated district

(House Bill 5930 was introduced on a bipartisan basis in September of 2012 but never received a hearing).

At the same time, the situation in both districts continued to deteriorate. On June 28, each superintendent received a letter from the Director of the Office of State Aid and School Finance at the Michigan Department of Education, related to their deficit elimination plans. Both letters began with a significant concern on the part of the department related to the growth of the projected deficits. In Ypsilanti, the deficit was projected to grow to -\$10 million by the end of June 2012, from -\$4.9 million on June 30, 2011; and in Willow Run the deficit was projected to be at -\$2.5 million as of June 30, 2012, which was up from the -\$1.7 million at the end of the prior school year. The letters signaled that the deficit elimination plans (DEP) were being granted “contingent approval.” One of the contingencies for Ypsilanti underscores the concerns:

Due to the serious situation that the district is in and the ambitious assumptions included in the plan, such as aggressive concessions, the district must advise the MDE on the progress of its implementation of this DEP through bi-weekly telephone conversations. (MDE letter to Dedrick Martin, June 28, 2012)

An article in the *Ypsilanti Courier* on July 24, covering the Ypsilanti Board meeting the night before, noted the potential of an emergency manager, missing paydays, and other financial challenges as a result of the growing deficit and declining enrollment in the Ypsilanti district. Superintendent Martin was quoted saying, “It’s essentially a culmination of multiple years of spending more than we brought in. We’ve been in borrowing/spending mode since 2003–2004 and now we’re at a point where we’ve capped out at spending” (Shaw, July 2012). Both the superintendent and the board president were reported as

emphasizing the importance of the education of the students and that the financial challenges should not be allowed to negatively impact what was taking place in the classroom.

However, there was a sense of urgency associated with the conversations reported at that board meeting.

Another article in *Courier* that day reported on the Willow Run board meeting that took place July 19 of the prior week. It reflected a robust board discussion regarding the financial challenges and who was to blame, with one Willow Run board member squarely identifying the State as the source of the problem:

“It’s their underfunding, and the games that they’re playing, that have for the most part caused us to get in this situation,” Wilde said. “I’d like them to look into what they can do to eliminate part of the debt that they themselves have caused us to be in.” (Marshall, July 2012)

The two superintendents and their boards understood the challenges, but that did not necessarily mean that everyone saw consolidation as the solution. Mr. Garrett, reflecting on the sentiments within the Willow Run community, recalled:

The Willow Run side, because of their history, because of their name, because of what they meant in the past, to be honest with you, they were willing to let the state emergency manager take over just to keep a name, just to keep a name. That totally blew my mind. I said, you mean to tell me, you’d rather hold on to a name then to take a chance and give these kids something that they probably would never have. I mean, at Willow Run... we were very selective on the classes that we had. I mean, electives—what was that? You know, it was slim pickings and to me, what really blew my mind is that, ok these parents care more about a name than the education

they can offer to their kids—and it it just baffled me. So me, Laura, and can't think of his name right now, he was our financial manager at the time, Bert Emerson—we sat down. He laid out a plan. So when he laid out the plan I looked at the plan, I said “wow.” I said, “so no matter what we do, the end result is either close or let the manager work take over” and it got to the point to where they were talking about closing 9 through 12 just to keep 1 through 8 open. And I said, “really, is this what we've come to? We want to hold on because of a name?” And so then, I knew right then, that Willow Run was *not* happy with the situation and God bless Laura, she had to deal with it on a daily basis. I only dealt with it every other Monday, you know at board meetings, but she had to deal with it on a daily basis. And finally, she, I don't know how she did it, she continued to, you know, press forward, and she got em to start to see differently, and I remember the conversation me and her had, and we were in a room by ourselves over at Kaiser, “close the door”—she said, “Don, what do we do?” She said, “Whatever you say do, we'll do.” I said, “Well Laura, I think the best interest is let's do it. If we lose where we at now, oh well, long as we know we did it; we was in it for the kids.” (personal communication, February 22, 2016)

The two superintendents, while also participating in consolidation conversations, continued their efforts to address the financial challenges in accordance with state law. The struggle was overwhelming given the size of the operational deficits and the fact that significant concessions were being asked from staff within each district. Mr. Bates, in thinking about the importance of a third party facilitator and time constraints noted,

I give credit to both superintendents for maintaining the level of support that they were able to maintain as it [the consolidation process] moved along and I think it's

important to recognize that they couldn't really invest in the process for another reason—and that is that their full time jobs running their own districts. I mean those day-to-day problems that superintendents face—every single one of them is still there. And if you're talking about consolidating, it's truly another full time job.

(personal communication, January 18, 2016)

With the growing dark clouds threatening state intervention as a backdrop, the Collaboration and Communication Task Force was scheduled to meet and review a plan that provided a picture that was more hopeful and aspirational as a result of the summer planning work.

On July 30, 2012, the Collaboration and Communication Task Force convened to review the draft Unification Design Plan. Consistent with the established procedure, the task force adopted a resolution based on having achieved the criteria established by the two boards in April. The resolution (Appendix J) provides a detailed statement regarding each of the conditions established by the boards and concludes by recommending that the question of consolidation be placed on the November 6, 2012 ballot. The current financial and academic realities, coupled with the prospect of appointment of an emergency manager, contributed to a sense of urgency and need to act in order to maintain local control.

Third Joint Board Meeting

On August 8, 2012, nearly one year after the first historic joint board meeting, members of the Ypsilanti and Willow Run School boards convened in the Eastern Michigan University Regents' board room. This time the agenda was clearly to take the next steps related to placing the question of consolidation on the November 6, 2012 ballot. The work of envisioning what could be and developing a plan for unification was complete. The meeting began at 7:30 p.m., and only one board member from Ypsilanti was absent. President Bates

and Garrett jointly ran the meeting. They started with a review of the work undertaken subsequent to the April joint board meeting and concluded with the intent of the meeting to formally place the question of consolidation on the November ballot.

Three key policy makers provided special presentations. First, State Superintendent Michael Flanagan addressed the board. He remembered, “In fact, I think I rearranged planes or something to get back and swing by something one day ‘cause I felt that



Figure 6: State Superintendent at Third Joint Board Meeting

Superintendent Flanagan addressing the school boards at the joint board meeting on August 8, 2012

strongly that you were out on a limb and if this didn’t work we’d never get any of them to work.” His comments to both boards that evening confirm his recollection, "One reason I jumped through hoops to some degree to get here is I think you can be a model for the rest of the state," Flanagan told members of the boards. "We can't, at the expense of the education of our kids, afford to have 500-some districts anymore, quite frankly" (Shaw, August 2012). His presence and comments at the meeting were critical in helping to address concerns about the supports necessary to ensure the financial challenges related to the deficits could be addressed in a manner that did not undermine the potential for improving educational opportunities for students. Mr. Flanagan reiterated his willingness to use the tools at his disposal to assist with extending the deficit repayment period beyond the conventional timeline should the districts consolidate. He commended the boards and superintendents for being “trailblazers” and “pioneers” (board minutes August 8, 2012).

Representative Rutledge followed Superintendent Flanagan. His presence brought

the conversation full-circle from the launch in August of 2011 where he pledged not to change his t-shirt until the two districts came together. He commended the boards, the two superintendents, and the WISD for the work they did in moving the process forward. He shared with the board the efforts that he and Representative Rogers were making on behalf of the two districts related to the consolidation effort, specifically referencing the bill that was crafted to place a three-year moratorium on any new charter in the boundaries of a consolidated district. He also noted that he had his eyes on the \$10 million in the school aid budget and that he had conversations with the Michigan Department of Education, Treasury, and the Governor's office indicating the desire to ensure some of that money was used for the Willow Run/Ypsilanti effort. Representative Rogers also made a few brief remarks to the boards. He recalled initially being approached by Representative Rutledge and engaging in conversations during the course of the past year related to state policy and funding. He commended the boards as well for their focus on doing what was in the best interest of the students (board minutes August 8, 2012).

Prior to the vote, only one person spoke during the call to the public. The individual was a teacher in the Ypsilanti district who expressed her appreciation for her job and indicated she was looking forward to working in the newly combined district. It was a surprise that this was the only comment from the public prior to the board decision. Subsequently, the boards introduced the requisite resolutions in order to place the consolidation question on the November 6 ballot (Appendix K). Unlike the first board meeting in the Eastern Michigan University Regents' board room, this time board members engaged in discussion from the table once the resolutions were properly on the floor. Four trustees from the Willow Run district made comments and only one Ypsilanti trustee spoke

during the discussion. Trustee Meadows, one of the two individuals who voted no at the April meeting, outlined her thinking about this effort. The minutes record the following: “Trustee Meadows said she is concerned about the future of the district and that consolidation will not advance the district into the future. She said that she was worried about unifying unstable districts with poor academic performance and budget deficits.” Although she concluded by saying the voters should decide, she still opted to vote no on the resolutions. When the board presidents called the question, the Ypsilanti board voted 6-0 in favor of placing the question on the November ballot and the Willow Run board voted 5-2 in support. Although there was hope for a unanimous vote by both districts, the two Willow Run dissenters were the same individuals who cast the no votes at the April 16 meeting as well.

The final comments from the superintendents and board presidents set a hopeful tone. They focused on the community engagement and information that would follow to educate the community on what the consolidation entailed as well as to obtain feedback. Mr. Bates noted the long hours leading up to this point and the opportunity this represented to “re-shape education in eastern Washtenaw County.” A final call to the public was made, but there was none. In reflecting on this meeting, Ms. Lisiscki observed,

That meeting was very emotionally charged. I remember that there were

people that wanted it and didn’t want it...but so it was very charged and we had the



Figure 7: Consolidation Collaborators
After the vote on August 8 pictured from left to right—Laura Lisiscki, Scott Menzel, Representative Rogers, Dedrick Martin, and Representative Rutledge

vote...I remember the feeling of, oh my God we have so much work to do, how are we going to get this done? (personal communication, January 15, 2016)

What began as a conversation around shared services now shifted into a full-blown campaign to share the vision of a new unified school district in Ypsilanti.

Summary

The process implemented to engage the community in designing a plan for a new unified district was critical to the overall success of the consolidation effort. The key leaders interviewed pointed to the breadth of community engagement coupled with the facilitation of the WISD as key factors in the successful consolidation vote. Starting with the second joint board meeting, members of the community and school boards began to ask critical questions regarding the potential for consolidation. The first meeting in August 2011 had a certain euphoria around it that dissipated by the time the two boards reconvened in April. The financial challenges were worsening and the prognosis for both districts becoming bleaker. The conditions for action were ripe, but it was not until the culmination of the design process that a new picture for what was possible emerged—a compelling picture of a unified district that could deliver an educational system that aligned with the hopes and aspirations of the community. The next chapter will address the process used to communicate the vision to the community and secure support that resulted in 61% of voters in both communities approving the consolidation proposal.

CHAPTER 7: MAKING THE CASE—THE CAMPAIGN

Now, I'll also say here, I did not think that it was, in and of itself—to bring two financially distressed districts together—that would be some kind of solution to their financial woes. That was a spark that got me thinking of this. But that spark caught fire in my mind because it led me to think about what would happen if you could bring two school districts together and create a totally different education that might in fact be a catalyst for attracting student enrollment rather than having it decrease.

—Representative David Rutledge

From the August 8 joint board meeting, where the question of consolidation was officially placed on the November 2012 ballot, through the election represented an intense period of education and advocacy. Numerous sessions were held across both school districts. This final sub-phase of the consolidation process includes many important components. The Collaboration and Communication Task Force continued to meet during the fall months as the information and advocacy campaigns got underway. The Washtenaw Intermediate School District board of education began the process of outlining criteria for appointing new board members in anticipation of a successful consolidation vote as required by law. In October, the Eastern Michigan University Board of Regents voted to authorize a new charter school to be located across the street from the Willow Run Middle School/High School complex—the timing of which could not have been more controversial in light of the consolidation effort. Policy efforts in Lansing continued to unfold, but without any concrete action. After reviewing the above components, the chapter will conclude with a review of election night and the results on the two ballot questions and the appointment of the new board.

Information and Advocacy Campaign

During the summer, the Washtenaw Intermediate School District, in partnership with the two districts, decided to commission a survey by EPIC-MRA to determine voter

sentiment in both the Willow Run and Ypsilanti school districts. The telephone survey was conducted between July 28 and August 4, 2012, of 600 randomly selected likely voters, 300 from each district. The poll had a +/- 4% error rate (5.7% in each district). Key findings included the following:

- 56 % would vote “yes” on the first consolidation test (45% direct and 11% lean).
- 66% would vote “yes” after more details were provided (57% direct and 9% lean)
- 67% voting “yes” after positive arguments (57% direct and 10% lean)
- 61% voting “yes” after arguments against (50% direct and 11% lean)
- The solid “no” and lean “no” ranged from 19-28%
- Although arguments against consolidation were less convincing, they caused more of a drop in support than positive arguments caused an increase. (Survey Memo, August 7, 2012)

The data from the EPIC-MRA survey outlined the strengths of various arguments for and against consolidation. The summary included this note, “Clearly, the vote for consolidation can be won in both districts, but without an effective communications effort, it can be lost as well.” The data was useful in thinking about messaging throughout the campaign.

The Collaboration and Communication Task Force met twice during the fall in September and October, but the agenda shifted from identification of issues and gathering data in order to make recommendations to the boards, to a focus on communication regarding the design elements of the new district, schedule of informational meetings in the community, criteria for the selection of new board members, and next steps in the design work, including student voice and engagement. This latter point was important given one of the core values identified in the summer was student voice and engagement. On September

25, student focus groups were held at Ypsilanti High School, Ypsilanti New Tech, and Willow Run High School by WISD facilitators. These individual focus groups were followed by a forum hosted by Washtenaw Community College on October 8 where more than seventy students from the two districts came together to engage in facilitated dialogue about the potential of a unified district. Given this item was on the agenda for both task force meetings in the fall, it is clear the leadership was intent on following through on their core values.

While most people were aware of the primary ballot question proposing to consolidate the two districts, a second ballot proposal was required in the event the first passed. The task force spent time discussing this as well. Given the way schools are funded in Michigan, districts are expected to levy 18 mills on non-homestead parcels. It is assumed that every district is levying the full 18 mills and the state payments to local districts are adjusted accordingly. Since both the Ypsilanti and Willow Run districts were already levying the 18 mills, not much thought was given to the importance of this during the conversations leading up to the August 8 meeting of the two boards. However, as the information campaign launched and ballot language was being shared throughout the community, it was clear that the second ballot proposal was going to be confusing to people, if for no other reason than the convoluted language required by the law. The full ballot language, not including the preface, reads as follows:

Shall the limitation on the amount of taxes which may be assessed against all property, except principal residence and other property exempted by law, in the consolidated territory of Willow Run Community Schools, Washtenaw County, Michigan and School District of Ypsilanti, Washtenaw County, Michigan be

increased by 18 mills (\$18.00 on each \$1,000 of taxable valuation) for a period of 5 years, 2013 to 2017 inclusive, to provide funds for operating purposes for the consolidated school district; the estimate of the revenue the consolidated district will collect if the consolidation proposition and the millage is approved and levied in 2013 is approximately \$8,920,000 from the local property taxes authorized herein (to be effective only if the question of consolidation is approved by the electorate at this same election)?

Although voters in both districts previously approved the 18 mill non-homestead levy, the ballot language has always been a source of concern, and in this case even more so since it states “shall the limitation...be *increased* by 18 mills.” Because a consolidated district is legally deemed a new entity, the 18 mills were considered an increase and not a renewal. Additionally, there was nothing in the ballot language to signify this was a replacement of the existing levy in the two independent districts. At the time the EPIC-MRA survey was commissioned, no questions on voter sentiment related to this second ballot proposal were included. In early September, the WISD prepared a one-page “Key Messages” document that included an explanation of the second ballot question clarifying that it was not really an increase, but rather a replacement. A second part of the key messages document included clarification of the language of consolidation vs. unification. As noted previously, the framing of this work as a unification was adopted in March of 2012, and this framing continued through the vote. However, the title of the ballot proposal was “School District Consolidation Proposal” since consolidation is the technical language in statute. Fortunately, the actual ballot question stated in part, “Shall the territory of the

following school districts be united to form one (1) school district?” The key messaging document included the following statement:

Because of the significant financial and academic challenges facing both districts, the language of unification has been selected to reflect a commitment to fundamentally changing the system—resulting in the creation of a new system that focuses on meeting the needs of children from “cradle to career.”

The vision for the new unified district continued to be a key part of the informational meetings that were taking place.

The communication strategy included numerous meetings in various school buildings and across both districts and communities. Participation varied among the leaders.

Sometimes all three superintendents were present, at other times only one of the superintendents took the lead. Appendix L includes a spreadsheet that details events and meetings that were part of the information campaign. For example, all Superintendents Martin, Lisiski, and Menzel presented to the Willow Run and Ypsilanti joint staff meeting on August 30. Visits were made to neighborhood associations and three public forums were held in October, two of which took place in churches in each community. Mr. Peoples referenced the importance of

getting to the community and getting to the major organizations within the community—keeping in mind for Willow Run, there is no city. There’s a community so it was very important to get to where the community went to. You know, the plaza, the school, and the churches. That was very important. (personal communication, February 11, 2016)

Not only were a few sessions held in churches, there were at least three visits to different churches on Sunday mornings where the pastors extended an opportunity to share information about the consolidation vote and its impact on the community.

Communication was not limited to those considered likely supporters. On October 5, Mr. Bates; Ms. Thomas, Willow Run board member; and Mr. Menzel were invited to present to the Willow Run Tea Party Caucus. This was an active anti-tax group that in the months preceding the vote had been engaged in opposing the Governor's proposal to construct a second bridge between Detroit and Canada. The group met at the Big Sky Diner on Ecorse Road at 9 p.m. every Friday evening. Although the leader of the caucus indicated the presenters would have about an hour on the agenda, by the time the presentation concluded and all of the questions and concerns were addressed, it was after midnight. However, at a subsequent meeting, the Willow Run Tea Party Caucus chose to support the consolidation effort.

The three superintendents and several board members also spent time working with print and television media in order to reach as many people as possible. Radio interviews were common. All three superintendents were invited to be on the Lucy Ann Lance show the day following the August 8 joint board meeting. Access Cable TV provided five minutes to share information about the consolidation. Numerous newspaper articles were written detailing various aspects of the proposal. The online news stories generated a fair amount of comments both for and against the consolidation.

A concerted effort was made to meet in various school buildings in each of the two districts to answer questions from the staff. As would be expected, staff members were concerned about their future employment prospects and they also wanted to understand all of

the issues. At a meeting on October 22 at the Primary Learning Center in Willow Run, staff members suggested that Willow Run was in a better financial position than Ypsilanti (personal notes). This theme was heard many times throughout the campaign and was based on the amount of the deficit projected in each district (\$10 million for Ypsilanti and \$2.5 million for Willow Run). Mr. Garrett recalled addressing this with another resident in Willow Run:

I said “because of the enrollment, because of the numbers that they have at Ypsi, it may look like they’re bigger in debt than we are but they’re not—actually it’s equal if not, we may be more in debt than what they are because of what we have coming to the table and what we don’t.” (personal communication, February 22, 2016)

As information was shared with staff members in both districts, people began to understand the severity of the economic conditions for both Ypsilanti and Willow Run. While not everyone was excited about the prospect of the consolidation after the forums and meetings, nearly everyone seemed to understand the nature of the reality and why the two districts were working to move in this direction.

Another group that engaged in conversation during this time period was the union leadership from both districts as well as the uniserve directors, who are regional staff members for the Michigan Education Association that work with multiple bargaining units, for both the professional and support staff. On October 15, the union presidents from both districts, along with two uniserve directors, met with Superintendents Martin, Lisicki, and Menzel at the Ypsilanti administration building. The union leaders prepared the agenda for the meeting. The conversation included review of the merger plan, the proposed rubric for selecting new board members if the vote passed, the selection criteria for a new

superintendent, meeting with community groups, a request for a “pre-agreement” (seniority, pay, insurance, etc.), and a question “Do you want our help?” The final item was a discussion about canvassing the community. Because of the financial situation in both districts, and the declining enrollment each experienced on an annual basis, assurances were not given to the union leaders regarding any pre-agreements. The unions also did not formally act to support or oppose the consolidation proposal. However, at the November 1, 2012 Willow Run Community Schools Board of Education meeting, the board considered a resolution endorsing the rehire of Willow Run teachers according to their collective bargaining agreement. Section 25 of the collective bargaining unit addressed the subject of annexation, consolidation or other reorganization of the school district and called on the Willow Run board of education to make a “good faith effort within applicable legal guidelines to assure the continued employment of its teachers in such district.” The board’s resolution endorsed the rehiring of its teachers meeting the “good faith” requirement, while members of the board also understood that they could not guarantee such employment subsequent to the consolidation vote (Willow Run Community Schools November 1, 2012, Board Agenda).

The union issues throughout the consolidation effort emerged as an area of significant concern, although most of the issues surfaced after the Phase I period in this case study. The unions in both Willow Run and Ypsilanti were historically strong and active. The consolidation conversation left many questions unanswered leading up to the vote. Without specific assurances with respect to employment post-consolidation, it is understandable why the union was reluctant to take a formal position. At the same time, union leaders were

represented on the Collaboration and Communication Task Force and provided important input throughout the process. Ms. Lisiski referenced the importance of that voice:

I very clearly remember one of our teachers. You know, she was fighting it tooth and nail, but I think I even said to you, “She is one that if we get her to believe this on her own by what she hears and sees and does whatever research she needs to do, she’ll be the biggest champion of it” and that happened. (personal communication, January 15, 2016)

During the summer of 2012, the three unions in Ypsilanti agreed to contract concessions including roughly 12.7% in wage, benefit reductions, and furlough days for the teachers. In an AnnArbor.com news story on the financial distress in Ypsilanti, the YEA president indicated, “The teachers at Ypsilanti Public Schools have a strong connection to the community and the district, Siegel said, adding the union intends to wait and see what the other bargaining units have given up” referring to the possibility of additional concessions beyond the 12.7% (Arndt, August 2012). The consolidation conversations added more uncertainty to the already challenging dynamics staff and leadership were tackling in Ypsilanti and Willow Run.

In summary, the information sessions included some intense debate through the Q&A sessions. The concerns largely reflected potential loss of identity and history which was true for both districts, although perhaps more palpable in Willow Run, the smaller district, which felt as though their identity was more at risk. Other concerns included what would happen with staff, buildings, transportation logistics, and the debt related to facilities in both communities. The advocacy committee met frequently in the fellowship hall of a church in Ypsilanti. They were passionate about conveying the reasons why the community

should support the proposal. Co-chair of the advocacy committee, Lavada Weathers, was quoted in an Ann Arbor.com story on October 27 as follows:

“I tell people who are against it that the bad part about all this is, if we don’t vote to do it, it’s really going to be chaotic—especially if the state comes in and takes over”, she said. “If we go with consolidation, we still get to fight for what we want. The staff, the curriculum... “We’re scrappers in Willow Run. We’ll get what we want,” she said with a chuckle. “But if we let the state take over, we’ll have no voice. We’ll be stuck.” Weathers said she found while out educating people about the merger proposal that the teachers and community members in the Willow Run district are less supportive of the merger than those in Ypsilanti. (Arndt, October 2012)

The two-pronged approach of heavy doses of information, delivered throughout both school districts and close to where people lived, combined with an advocacy campaign that included direct mailings (see Figure 8), yard signs, and door to door campaigning contributed to the final outcome on November 6. Although not everyone was supportive, the sentiment expressed by Ms. Weathers reinforced the idea that consolidation was the best option of those available, not necessarily the preferred option for either community.

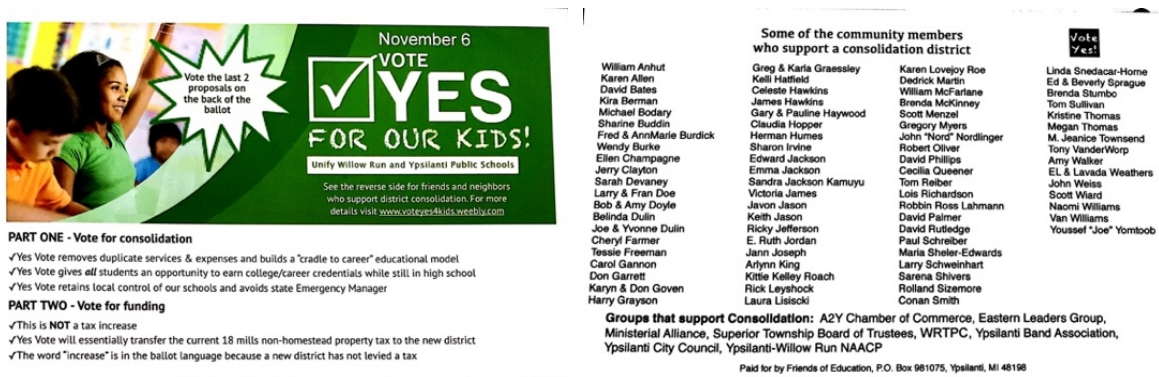


Figure 8: Advocacy Post Card (both sides)

WISD Selection Criteria for Appointed Board

Following the decision to place the consolidation question on the November ballot, the Washtenaw ISD board of education began the process of developing a timeline and structure for appointing board members within ten days of certification of election results as required by Michigan Compiled Laws (MCL 380.861). The board held its first conversation about the criteria and process on August 21, 2012. Since consolidations happen so infrequently in Michigan, there was only one recent example from which to draw. Unfortunately, the consolidation of Britton-Macon and Deerfield was a little different. They were two small, rural districts, with a strong history of collaboration, meaning they shared athletic teams, a superintendent, and some high school classes before voting to merge. Neither of the districts was in deficit at the time they approved consolidation, and they already had a single superintendent in place serving both districts. The WISD superintendent had a telephone conversation with the superintendent of the Britton-Deerfield district on August 10 (personal notes) to garner any advice he had with respect to lessons learned. Regarding the board appointment process for Britton-Deerfield, the Lenawee Intermediate School District relied heavily on the recommendation of the two school boards and agreed that four members would come from the larger district and three would be selected from the smaller district. While this would have been a legitimate approach for the Washtenaw ISD board to take, board members also recalled the comment at the April 16 joint meeting where the ability of the board members who contributed to the financial demise of the districts to “get the bus out of the ditch” was called into question. Instead, the board decided to adopt criteria for selection that met both the legal requirements as well as reinforced the core values, vision, and essential domains as articulated during the summer visioning work.

Specifically, the board stated, “It is the intention of the WISD Board of Education to select the most qualified individuals who will provide leadership and direction for the new unified district as outlined in the design document.” Appendix M includes the Selection Criteria and Process document. The board of education entertained input from others, including the Collaboration Communication Task Force and they held an open forum at the Ypsilanti High School auditorium on October 22 to solicit input at the request of local union leaders. In October, the board began the process of accepting applications from interested individuals with a due date of November 1. Given the time constraints with respect to appointing a new board, the WISD board of education moved proactively to ensure everything was in place in order to proceed with a thoughtful and deliberate process for selecting the seven-member board.

Eastern Michigan University Surprise

On Tuesday, October 30, the Eastern Michigan University Board of Regents took action to authorize three new charter schools—one of which was to be located in Ypsilanti, across the street from the Willow Run Middle School/High School Complex. The news was a devastating blow to both districts. Representatives from Eastern Michigan University were key participants in the visioning process during the summer and the university even provided funding to help offset the cost of the consultant. As part of the vision for creating a cradle to career system of education, Eastern Michigan University was seen as a critical partner; and now, just days before the election, the Regents decided to introduce more competition in the boundaries of the proposed consolidated district that could further exacerbate the financial and enrollment challenges.

Calls were made to the head of the Charter office at Eastern as well as the

Government and Community Relations director to inquire about the decision. Many people within the university community expressed concern and even outrage at the decision.

Representative David Rutledge also commented: "Both of these school districts [Ypsilanti and Willow Run] have now gone to great lengths to get this issue of consolidation before voters, and it really seemed like they [the EMU Board of Regents] were trying to sneak this in before the election," Rutledge said in an interview with *AnnArbor.com*. "It seemed really disingenuous." (Arndt, November 6, 2012). This was particularly an affront given HB 5930 was introduced by Representative Rutledge to protect against this very development. In a letter to EMU President Susan Martin, Superintendents Lisiscki and Martin expressed their "shock and dismay" related to the announcement. They recounted the various partnership efforts underway between the two districts and Eastern Michigan University and expressed disappointment that there was no advance communication from the University about the charter authorization, but instead they learned of the decision when contacted by *annarbor.com* for comment. The letter concludes with the following:

While we personally believe that charter schools have a place in the educational landscape of our community, we would certainly hope that our local university would consider and possibly work with neighboring districts as we all strive to create meaningful and sustainable opportunities for the benefit of ALL children in the Ypsilanti area. While we are not speaking on behalf of the Willow Run and Ypsilanti Boards of Education, we are both concerned that the recent decisions by the EMU Charter School Program and the Board of Regents may compromise our existing and future partnership opportunities. (letter to President Susan Martin, October 31, 2012)

In responding to the concerns expressed by leaders in the consolidation effort, the

head of the charter office at EMU was quoted in a news story "We run into those who favor it and those who oppose it. Our concern is the students and families," he said. "In the charter school world parents vote with their feet. If they're not receiving services they will leave" (Woodhouse, 2012).

The EMU decision represented yet another obstacle and challenge for the two struggling districts. It also contributed to widening the divide between the university and the educational community. The role of Eastern in authorizing the Education Achievement Authority—a move that many within the university, especially in the school of education—objected to, coupled with the new charter authorized in Ypsilanti, signaled that Eastern was not interested in investing in the success of the public schools within the shadow of the university. As the consolidation effort progressed, these dynamic tensions continued to manifest themselves in ways that resulted in a lesser influence on the overall outcomes of the consolidation than otherwise would be desired.

Not all the news was bad prior to the election, however. On October 28, 2012, the *Ann Arbor.com* editorial board issued an endorsement for the consolidation effort noting that "This is a landmark decision for the Ypsilanti area, one that will shape its future beyond the classroom due to the contributions of local schools to the fabric of a community" (Ann Arbor.com endorses consolidation, 2012). The recognition by community leaders in both the Ypsilanti area as well as throughout Washtenaw County of the significance of this undertaking reinforced the importance of the vote.

Election Night Returns

After months of intensive communication and outreach, decision day dawned with a sense of cautious optimism that voters in both communities would support the consolidation

proposal. Volunteers spent time at various precincts throughout the day, with specific focus during peak voting times in the morning and after work. Around 8 p.m., members of the advocacy team and leaders of the two districts and the Washtenaw ISD gathered at a local restaurant across the street from Eastern Michigan University to track the election returns and decompress after an arduous campaign effort.

Some individuals remained at key precincts following the closing of the polls in order to get printouts of the results in those precincts. Slowly results began trickling in and the numbers were encouraging related to the consolidation proposal. The votes on the 18 mill non-homestead levy was much closer and the outcome uncertain based on the initial returns. Computers were set up to track returns through the Washtenaw County clerk's election website. Additionally, a large sheet of paper was hung on the wall so results could be posted for all to see. In the background, election results from the 2012 presidential race were being displayed on mounted TVs. There was no local television coverage of this campaign given not only the presidential election but many other ballot proposals in Michigan at that time.

Around 11 p.m. it became clear that the voters in both communities embraced the consolidation proposal. The certified election results paint a more complete picture. Every precinct except one in the city of Ypsilanti passed the consolidation proposal. A total of 61% in both school districts voted yes on consolidation. The second ballot measure was a much closer affair garnering only 54% support in Ypsilanti and a razor-thin margin of 50.88% to 49.12% in Willow Run. Tables 16–19 provide the precinct by precinct totals.

Table 16

Willow Run Community Schools
School District Consolidation Proposal

PRECINCT NAME	Yes	No
Superior Township, PCT 1	0	0
Superior Township, PCT 2	805	332
Superior Township, PCT 3	493	352
Superior Township, PCT 4	566	282
Superior Township, PCT 5	79	40
Superior Township, AVCB 1	585	283
Ypsilanti Township, PCT 5	390	273
Ypsilanti Township, PCT 6	312	235
Ypsilanti Township, PCT 7	416	339
Ypsilanti Township, PCT 8	107	74
Ypsilanti Township, PCT 10	399	289
Ypsilanti Township, AVCB 1	498	423
Totals	4650 61.41%	2922 38.59%

Table 17

Willow Run Community Schools
Operating Millage Proposal

PRECINCT NAME	Yes	No
Superior Township, PCT 1	0	0
Superior Township, PCT 2	597	489
Superior Township, PCT 3	439	374
Superior Township, PCT 4	459	349
Superior Township, PCT 5	46	75
Superior Township, AVCB 1	432	399
Ypsilanti Township, PCT 5	319	317
Ypsilanti Township, PCT 6	257	264
Ypsilanti Township, PCT 7	355	362
Ypsilanti Township, PCT 8	88	82
Ypsilanti Township, PCT 10	344	323
Ypsilanti Township, AVCB 1	356	531
Totals	3692 50.88%	3565 49.12%

The percent of voter participation in the two districts ranged from a low of 35.59% in the City of Ypsilanti Ward 1, Precinct 3 to a high of 54.3% in Ypsilanti Township Precinct 14. The overall county participation rate was 64.48%. This compares to a lower turnout in the 2014 November election where the county participation rate was 43.81%, and the participation in the Ypsilanti area precincts ranged from a low of 10.67% to a high of 58.84% with most of the totals hovering in the 30–40% range (Washtenaw County Clerk election website). The boards’ deliberately chose the November 2012 election in order to ensure the highest number of voters were making the decision and presidential election years tend to bring people out to the polls in the Ypsilanti area.

Table 18

School District of Ypsilanti
School District Consolidation Proposal

PRECINCT NAME	YES	NO
City of Ypsi, Ward 1, PCT 1	290	302
City of Ypsi, Ward 1, PCT 2	443	209
City of Ypsi, Ward 1, PCT 3	315	182
City of Ypsi, Ward 2, PCT 1	353	151
City of Ypsi, Ward 2, PCT 2	387	201
City of Ypsi, Ward 2, PCT 3	388	130
City of Ypsi, Ward 2, PCT 4	364	317
City of Ypsi, Ward 3, PCT 1	287	184
City of Ypsi, Ward 3, PCT 2	462	174
City of Ypsi, Ward 3, PCT 3	510	243
City of Ypsi, AVCB 1	965	475
Superior Township, PCT 5	222	122
Superior Township, AVCB 1	101	72
Ypsilanti Township, PCT 1	637	441
Ypsilanti Township, PCT 2	463	349
Ypsilanti Township, PCT 3	442	323
Ypsilanti Township, PCT 4	629	478
Ypsilanti Township, PCT 8	316	282
Ypsilanti Township, PCT 9	614	405
Ypsilanti Township, PCT 13	0	0
Ypsilanti Township, PCT 14	4	1
Ypsilanti Township, PCT 15	438	318
Ypsilanti Township, AVCB 1	1015	613
Ypsilanti Township, AVCB 2	258	179
Totals	9903 61.69%	6151 38.31%

Table 19

School District of Ypsilanti
Operating Millage Proposal

PRECINCT NAME	YES	NO
City of Ypsi, Ward 1, PCT 1	265	277
City of Ypsi, Ward 1, PCT 2	395	222
City of Ypsi, Ward 1, PCT 3	269	201
City of Ypsi, Ward 2, PCT 1	303	182
City of Ypsi, Ward 2, PCT 2	334	225
City of Ypsi, Ward 2, PCT 3	348	137
City of Ypsi, Ward 2, PCT 4	322	309
City of Ypsi, Ward 3, PCT 1	238	187
City of Ypsi, Ward 3, PCT 2	362	233
City of Ypsi, Ward 3, PCT 3	445	257
City of Ypsi, AVCB 1	787	583
Superior Township, PCT 5	143	193
Superior Township, AVCB 1	73	98
Ypsilanti Township, PCT 1	593	437
Ypsilanti Township, PCT 2	415	369
Ypsilanti Township, PCT 3	396	340
Ypsilanti Township, PCT 4	529	508
Ypsilanti Township, PCT 8	258	318
Ypsilanti Township, PCT 9	523	455
Ypsilanti Township, PCT 13	0	0
Ypsilanti Township, PCT 14	4	1
Ypsilanti Township, PCT 15	349	370
Ypsilanti Township, AVCB 1	756	839
Ypsilanti Township, AVCB 2	188	241
Totals	8295 54.30%	6982 45.70%

While the two districts began to process the true impact of the vote to consolidate the districts, the Washtenaw ISD board of education turned its attention to their legal responsibility to appoint a new board.

Appointment of a New Board

As a result of planning during the fall, the WISD Board of Education was in a position to move quickly following the vote. Nineteen individuals submitted application materials for consideration to serve on the new board. The WISD Superintendent emailed a memo to each of the applicants on November 5 outlining the interview process as well as the time commitment that would be required of new board members throughout the consolidation process. The intent was to ensure the individuals were going to be available for the significant amount of work in bringing the two districts together. As a result of that memo, one candidate withdrew from consideration. Candidates were also sent the seven questions in advance and were informed that each interview would be twenty minutes in length.

Among those seeking an appointment were four board members from Willow Run and four from Ypsilanti. Two more applicants resided in the Willow Run district while the remaining eight lived in the boundaries of Ypsilanti Public Schools. Two of those individuals were uncontested on the 2012 ballot for seats on the Ypsilanti Public School board of education, although with the consolidation those results were rendered irrelevant. WISD board members received the materials on each of the candidates in advance of the interviews.

The first round of nine interviews took place on November 12 at the Willow Run High School Forum Room. The first interview began at 6 p.m., and the final interview was scheduled to start at 9 p.m. The four board members from Willow Run were interviewed on the first night. The second round of nine interviews began at 6 p.m. on November 13 at Ypsilanti High School in the YPS board room. The four board members from Ypsilanti were all interviewed on the second night in familiar territory. (Appendix N contains the brief

background information on each candidate interviewed along with the scheduled interview time.)

Having completed marathon interviews over the course of two evenings, the WISD board members were in a position of reflecting over the next six days on the candidates and determining which seven individuals met the criteria they established and were positioned to lead the consolidation process. The WISD superintendent and board president conferred regarding a process to evaluate the candidates at the meeting on November 19, 2012. This included a ranking system of “Yes/Maybe/No” of the candidates by their numbered application. The plan was to see if the pool of applicants under consideration could be narrowed from 18 to a more manageable number for board discussion prior to the final vote.

The meeting on the 19 took place at the Student Center at Eastern Michigan University, selected as a neutral site as were the other historic gatherings throughout the process. Mr. Peoples opening remarks began with a quick review of the consolidation effort. He proceeded to outline the statutory requirement for the WISD board to appoint a new seven-member board. All eighteen applicants were recognized as being “well-qualified”, but he reiterated that the job of the ISD board was to appoint only seven. He gave thanks to various leaders in the process and suggested to the applicants that those who were not selected would still be needed as the process moved forward stating, “If you are truly committed to this unification, there is a place for you at the table” (draft comments document and board minutes, superintendent archives).

As the board completed its initial rankings of Yes/Maybe/No, the number of candidates warranting further conversation quickly narrowed. Eight individuals received rankings of “Yes” and of those three received a “Yes” from all five board members. Another

three received a “Yes” from four of the five board members. Although there were twelve individuals who received at least one “Maybe” vote, only two individuals garnered three “Maybe” votes from board members. When combined with the “Yes” totals, the board was able to narrow the conversation down to eight individuals. The two board presidents who first met at an area restaurant to launch the conversation in the spring of 2011 were both unanimous selections to continue working on their vision. The Executive Director of the Eastern Leaders Group, Tony VanDerworp was also one of the individuals receiving a unanimous “yes.” Three other candidates had strong support and the board agreed they should be appointed as well. This led to a deliberation between two final candidates. Ultimately the board approved the following individuals: David Bates, Don Garrett Jr., Tony VanDerworp, Maria Sheler-Edwards, Dan Raglin, Celeste Hawkins, and Gregory Myers. The final composition reflected four new board members and three from the former boards. However, five of the individuals resided in the former Ypsilanti School boundaries and only two were from Willow Run. This was identified as a concern by Dr. Joe in retrospect: “If I remember, Willow Run got two member and Ypsi got five members and that was, to me, wasn’t proportionally right, but, that’s just my observation” (personal communication, January 25, 2016).

The appointed board represented an important mix of skills and experience that were necessary for the work ahead. The WISD board recognized the importance of having some individuals with board experience who could help navigate the numerous challenges with a sense of history of both from the Ypsilanti and Willow Run perspective. The two board presidents, as a result of their courageous leadership and vision were logical choices to fill this role. As other members were considered, the board was sensitive to the

Ypsilanti/Willow Run proportion but also was committed to appointing the seven individuals who best met the criteria. Tony VanDerworp, as Executive Director of the Eastern Leaders Group (ELG), was actively supportive and engaged in the visioning work during the summer. He understood the importance of a strong public education system to the ELG's work toward revitalizing the community. His background included time as a city manager, and he had demonstrated strengths in planning and implementation. Maria Sheler-Edwards was a communications expert who also served as the co-chair for the advocacy committee. Although her son attended a neighboring school district through School of Choice, it was her desire to ensure the newly consolidated district provided educational opportunities so she could enroll him in her district of residence. Celeste Hawkins was a parent of three students in the Ypsilanti school district. She was an active member of the PTO at Estabrook Elementary, and she also contributed to the summer visioning work. She raised important points related to equity and social justice and her background in social work, coupled with her dissertation studies, ensured another perspective at the governance table. Gregory Myers, the other former Willow Run board member, shared a compelling personal testimony regarding his experience going through the Pontiac school system. As a parent of four children in the district, he wanted to ensure the education they received actually represented demonstrated competence and not just movement through the system. The final board member was Dan Raglin, a local businessman with deep ties to the community. He was elected to the Ypsilanti board on the same ballot where voters approved the consolidation, so he never served in that capacity. However, his vision for the district, his understanding of business, and the community connections all added value to the new governance team. In reflecting on the quality of the new board, seven individuals were appointed who brought

tremendous skills and commitment to the challenges ahead. Compared to the struggles and challenges of the prior boards in both districts, this board presented an opportunity to take the necessary steps to implement the vision outlined by the community.

The appointed board took the oath of office the following Monday, November 26, 2012, at which time they replaced the former Ypsilanti Public and Willow Run Community boards for the duration of the school year. The new school district officially began on July 1, 2013. When asked about the process for appointing a board, the leaders in the process generally concurred that the requirement to have the Intermediate

School District make the appointments worked. Representative Rutledge stated it this way:

I do think that a transitional board is not a bad thing and that it be appointed. And I am satisfied that it's at the right place, the Intermediate School District. I don't know that when we've got a new board, I mean we've got a newly consolidated district, that on the heels of that it be good to in fact be electing a permanent board. (personal communication, January 29, 2016)

However, several others pointed out a significant challenge with the requirement that the appointed board serve until the next regularly scheduled election. While that was not until November of 2014, giving the appointed board nearly two years to guide the effort, the potential for



Figure 9: Appointed Board Members

Appointed board members L-R: Dan Raglin, Celeste Hawkins, Don Garrett Jr., David Bates, Tony VanDerworp, Maria Sheler-Edwards, Gregory Myers.

a majority change with all seven seats on the ballot at the same time placed some of the more significant system changes at risk. Mr. Bates suggested the following as an alternative: “To me, the logical approach to that is that, in the course of a consolidation, appointed board seats either have initial term limits on them that are staggered and or there’s some other mechanism for only turning over a certain number of board seats from the very beginning” (personal communication, January 18, 2016).

On the same day as the WISD appointed the transitional board to lead the consolidation effort, Representatives Rutledge and Rogers co-signed a letter to Representative Lisa Posthumus Lyons, chair of the education committee, urging her to consider testimony on HB 5930. The legislative session was drawing to a close, and there had been no action on the bill. Now that the voters approved consolidation, the two representatives were honoring their pledge to do all they could to ensure the effort was successful. Both representatives, in reflecting on the process, commented on their ability to work across the partisan divide and collaborate for the best interest of the students. Representative Rogers said, “We weren’t Republican. We weren’t Democrat. We worked together because we knew we had an opportunity to help all the constituents in the state and for that I’m always thankful to have those kinds of opportunities” (personal communication, January 15, 2016). Representative Rutledge, in a similar vein noted:

In doing something where you’re changing the status quo, you need partners. And, these partnerships cut across a lot of spectrums. I mean, what would happen if, because I’m thinking about this guy is a republican and I’m a democrat, you know, and you never start the conversation with it. There has to be a willingness to see a bigger picture and to understand that there’s something bigger here that you need to

get at. At any rate, the partnership between Bill Rogers and I was, I thought, just very very significant. And it didn't escape me that, that Bill Rogers chaired the purse strings. But he also had to have a willing mind to look at something along the education spectrum, the public education spectrum. (personal communication, January 29, 2016)

With the appointment of the new board completed, the work of actual consolidation was only getting started. In the days, weeks, and months ahead a tremendous amount of work took place that ultimately led to the launch of the Ypsilanti Community School district on July 1, 2013. That part of the case history should be studied by others, but it is important to note a couple of developments in that time period related to the policy landscape that first surfaced during Phase I but were not resolved until much later. First, Trustee Fanta from the Ypsilanti board raised a concern in April regarding the foundation grant in Ypsilanti being higher than in Willow Run. The statute on the books at the time would have yielded a weighted and blended formula for determining the foundation grant. This would have ultimately meant the new district received a lower foundation grant than what Ypsilanti Public Schools was receiving. Representative Bill Rogers was able to insert language in the school aid act during the budget process in early 2013 that addressed the concern and ensured that the new district received the higher foundation grant rather than a blend. Mr. Bates noted the significance of this when he said, "One of the things that stands out prominently in my mind, was the work that was done to arrive at a new formula for setting foundation allowance, I don't really think the consolidation could have been possible without that change in state policy" (personal communication, January 18, 2016). Although many residents expressed skepticism that the legislature would come through, in this case they did.

Additionally, in December of 2012, the Intermediate School District received word from the Michigan Department of Education that the full amount of the consolidation grant request was being awarded. The final negotiated amount was \$6 million, representing 60% of the total available statewide. This was significant as well since neither district had the resources necessary to cover all of the costs associated with bringing the two districts together. State Superintendent Flanagan was true to his word that he would do what he could to support these pioneering and trailblazing districts as they worked to improve educational opportunities for the students in eastern Washtenaw County.

In reflecting on the effort from that initial meeting in June of 2011 through the appointment of the new board, the key leaders in the process identified a number of lessons learned, policy recommendations, and thoughts on leadership that will be further explicated in the final chapter.

CHAPTER 8: FINDINGS AND CONCLUSIONS

Having helped to act as a catalyst and to shepherd one of the world's few peaceful transitions from a colonial occupation to a democratically elected president, I can say that a movement is born out of the convergence of dire conditions, a powerful idea, and people committed to carrying out that idea.

—Bishop Desmond Tutu

The purpose of this study was to identify the lessons learned and the policy considerations resulting from the process leading to the successful vote to consolidate Willow Run Community and Ypsilanti Public School districts. At the outset, conditions in both districts were dire. The powerful idea was the potential of hitting the “reset” button in order to create a cradle to career system that offered the children of the community the education they needed and deserved. Finally, it included the leaders who were committed to carrying out that idea.

As discussed in the literature review, there are numerous studies around consolidation efforts, although none of the studies focused on urban, mid-sized—between 3,000 - 9,999 students—districts with operational deficits and significant academic challenges. This case study adds to the literature by addressing that void. There are several case studies (Fairman and Donis-Keller, 2012; Rogers, Glesner, & Meyers, 2014; and Ballin, 2007) that looked at similar themes of policy and process lessons learned. Additionally, an article written in 2011 by Dan Mart provided his lessons based on his experience of leading the consolidation of two small districts in Iowa, and Chabe (2011) reviewed the feasibility study aspect of New York's consolidation policies. These lessons learned and policy implications provide a useful lens through which to compare and contrast the Willow Run and Ypsilanti consolidation effort.

The guiding questions for the research at the outset were the following:

- What were the conditions (social, political, historical, community, and other) that led to the successful consolidation vote in 2012?
- What role did the Washtenaw Intermediate School District play and to what extent did the third party facilitation of the dialogue impact the final outcome?
- In what ways is consolidation a viable strategy for addressing struggling districts (deficit and academically underperforming) especially in urban environments?
- What process lessons were learned that may assist other districts contemplating consolidation?
- What leadership lessons does this case study hold for school officials, policymakers, and community officials?
- What policies supported or hindered the consolidation effort? What policy changes can be recommended as a result of the lessons learned in this consolidation?

The conclusions and findings based on the data gathered through the interviews as well as other historical documentation will be reviewed in light of the above guiding questions.

While the data support the answers to the questions of what occurred and how it unfolded, the more salient question relates to a nuanced review related to why the consolidation happened at this juncture; namely, what was it about this moment in time, the people involved, the processes used, and the policy landscape that converged to result in strong community support of 61% in both school districts when the question was placed before them? Can we learn anything from those factors that inform consolidation considerations in

other communities? The diagram below shows the components of the historical case study review.

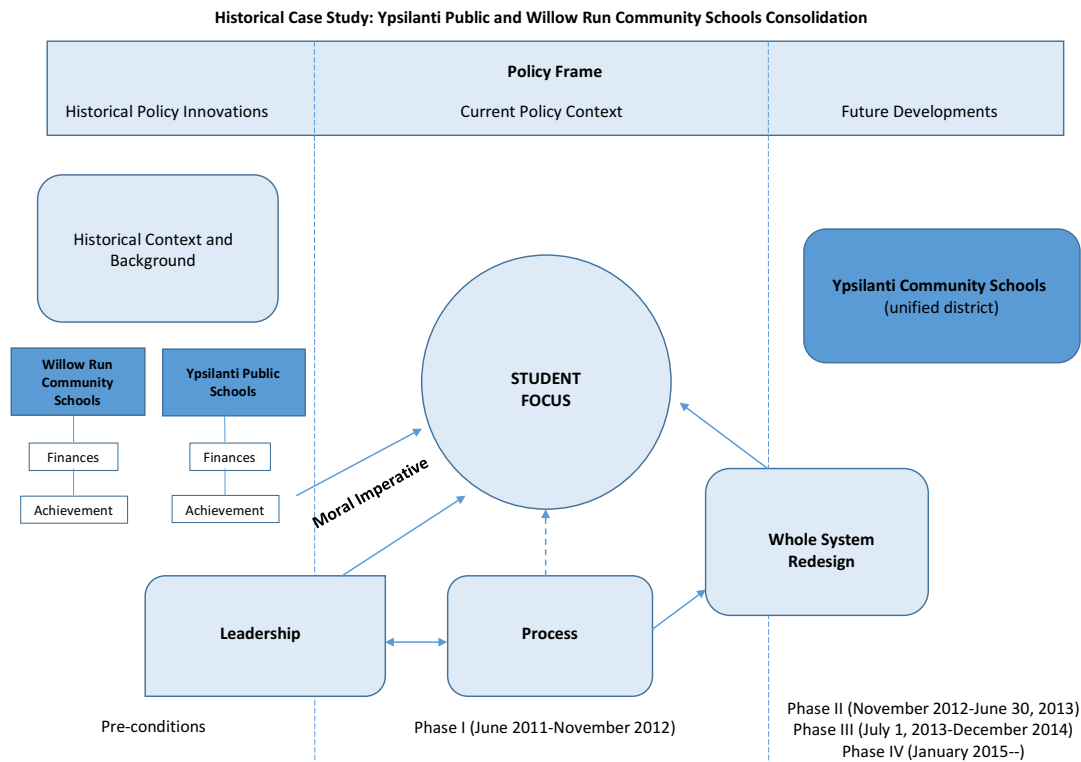


Figure 10: Components of Historical Case Study Review

Historical Conditions

In Chapter 4, the historical background and context was addressed in some detail. This included a review of the history of both school districts and communities, demographic trends, achievement data, state policies that reshaped the educational landscape, and the conditions in both districts just prior to the initiation of conversations. The historical background and context represents the necessary conditions, the chronological situatedness in time, that presented an opportunity for the leaders in the two districts and the Washtenaw Intermediate School District to leverage toward an ideal outcome, namely, a unified district designed to provide a quality cradle to career education system in Ypsilanti.

In analyzing the data from the interviews, three areas surfaced as most important related to the historical background and context. First, the leaders from the communities referenced the importance of local identity (code co-occurrence-16). Although local control was raised as well, its occurrence was significantly less than local identity. This was true for both communities, but was stressed more by the leaders from Willow Run and in reference to Willow Run, than by the leaders from Ypsilanti. Mr. Garrett put it in some of the strongest terms when he said, “The Willow Run side, because of their history, because of their name, because of what they meant in the past, to be honest with you, they were willing to let the state emergency manager take over just to keep a name, just to keep a name.” Ms. Lisicki noted, “The community had a very very strong sense of pride. They called it the Flyer pride... they really had a strong sense of ‘We are Flyers’ and they are very proud of it, and it’s just embedded in them and who they are.” There were fears that the consolidation would result in Ypsilanti taking over and dominating the decisions, leading to the loss of the history of Willow Run. Although the district was established in 1944, the community identity was wrapped up in the school district, and these concerns dominated early conversations and were on the minds of the leaders in the process.

The second key area was the financial distress and deficit status (code co-occurrence-16). It became clear that if the two school districts were not under such financial stress, the question of consolidation would not have been considered. This reinforces the sense of *kairos* as discussed in Chapter 2. Not only do the conditions have to be right—in this case, the dire financial situation coupled with the impending appointment of an emergency manager—but there must also be transformational leaders and policy entrepreneurs who make decisions to take advantage of these opportunities. To illustrate this point, the financial

distress existed for both districts in 2007. Although Ypsilanti was not yet a true “deficit district,” Mr. Bates noted the pattern of deficit spending that resulted in expenditures over revenue of about \$3 million annually. The effort to consider consolidation in 2007 failed to gain traction arguably for two reasons. First, three districts were invited to the conversation, only two of which were experiencing severe financial distress. Secondly, the new superintendent in Willow Run made the decision not to continue the discussion. This brings us back to the point made by Smith regarding “turning points” that include opportunities that were presented, seized, and missed (p. 52). While the opportunity may have been present in 2007, it was not seized by leadership at the time.

The third area that surfaced in the interviews related to a number of barriers to consolidation as well as opposition to the concept that existed in the past and were present at the outset of these efforts (code co-occurrence-19). The identified barriers ranged from the historical rivalry between the two districts and community pride and tradition, perceptions about the neighboring district and concerns about student safety, the political reality and reluctance on the part of school board members to do this as consolidation would mean some of them would not be on the board, concerns about marrying two failed districts and the associated financial challenges, and a lack of strong leadership.

The economic and academic conditions in both districts along with state policy with respect to emergency managers and the Education Achievement Authority were necessary for the communities to consider consolidation and to supersede the above barriers, but were insufficient to mobilize people to take that next step. The success of the proposal hinged on creating a compelling vision of the future where the educational system was designed to meet the needs of the children in the community. Hope and aspiration played an important role

juxtaposed to the negative alternative of state takeover and loss of local identity and local control.

Role of the Washtenaw ISD/Third Party Facilitation

The results of the interviews with key leaders in the process reinforce the importance of engaging a third party facilitator in supporting consolidation conversations. Every one of the leaders interviewed emphasized the importance of this as a key to the ultimate success of the endeavor. The board presidents first requested assistance because trust between the two districts was very low and the Intermediate School District had an established relationship with both districts and was seen as a trusted partner and neutral third party. Representative Rutledge framed it in the following way when he said the following:

I still believe that this would not have happened, in the very supportive way that it did, had there not been these boards coalescing around what I call a trusted guide. A trusted leader. . . . I think that's an important piece if you're looking at a model to duplicate this any place else that there needs to be that place, there needs to be that person and at that stage. And a good place to look for that person, because it would be hard to find it just looking around the community, a good place to look for that person is in an entity that both districts might have, might be beholden to, and will trust—and that's the intermediate school district. (personal communication, January 29, 2016)

One of the findings in the Fairman and Donis Keller (2012) study was “a trained and trusted facilitator who is familiar with the communities can help members stay focused on the task and overcome difference” (p. 38). Ballin (2010) also emphasized the importance of a neutral third party as a result of her consolidation study. These findings are consistent with

the results of this case study. While the role of the Washtenaw Intermediate School District included facilitation of the process from the initial request on June 15, 2011 through the appointment of the new board and beyond, Dr. Yomtoob suggested that a third party facilitator was important but that it did not necessarily have to be the Intermediate School District:

We needed somebody to be very impartial and start the process going. We tried to keep the, if you could say, personality out. I look at the, I think we need a third party. It could be a state department. It could be ISD. They're strong with resources who could help us to understand the concept. (personal communication, January 25, 2016)

Carol Wolenberg, former deputy superintendent of the Michigan Department of Education, reinforced this point when she suggested, "The bottom line always has been and will continue to be 'local control.' No matter how dire the district circumstance, unless districts interested in consolidating for whatever reason have the good sense to use a neutral third part (i.e. the ISD or MDE) it's hard to get things moving and staying on task" (personal communication, February 16, 2016). Mr. Bates noted he did not believe the consolidation would have happened without the facilitation of the ISD, and Dr. Hawkins also stated that

There can be definite benefits with the involvement of a third party. Oftentimes you can be so close to issues that "you sometime can't see the forest for the trees." Being a third party participant, the ISD was able to help the parties address ideas and issues that hadn't been contemplated. They were an unbiased party and brought clarity to many subjects. (personal communication, April 19, 2016)

In answering the research question "What was the role of the ISD?" some of the following items surfaced throughout the study:

- Facilitation of conversations at various levels including:
 - Steering committee (comprised of the board presidents, superintendents, and one other individual from each district) including agenda setting and logistics
 - Joint board meetings (behind the scenes meeting preparation coupled with chairing the first joint board meeting)
 - Collaboration and Communication Task Force meetings (agenda planning, research, and facilitation)
 - Intensive community engagement as part of the visioning work
- Communication and public relations support and strategy throughout the entire process. Neither district had staff to do this work on their own, and having the third party take responsibility helped ensure the information was seen as credible and not biased toward one district or the other
- Compilation of supporting documentation and relevant research (e.g., Data Portrait); study of issues identified by the Collaboration and Communication Task Force
- Liaison between local districts and the state (Michigan Department of Education, elected officials, and other key policy-makers)

Mr. Bates wrapped up his comments on the ISD facilitation process in this way:

Yes, the ISD led the process, but it's more than that. It's the fact that that process was so damn successful. I don't know how you can "can" that or make that into something that other people could use but ya know, that's what is sort of needed in helping turn around schools and turn around school districts and help people get focused on what

is truly important and what they value in their communities. (personal communication, January 18, 2016)

This leads to the next research question regarding the way in which consolidation can be viewed as a vehicle for addressing the challenges of struggling districts.

Consolidation as Opportunity to Address Challenges of Struggling Districts

One of the biggest concerns raised during the consolidation process related to questions around why anyone believed “marrying” two struggling school system—both financially and academically—would result in anything but a larger mess. Dr. Joe eloquently pointed that out in his public comment on April 16, but he concluded that “you make lemonade out of lemon” and that, in his mind, the consolidation effort represented an opportunity to create a district “like no other” focused on providing education from cradle to career. It was this idea of being able to hit the “reset” button, to identify a vision for what was possible, that represented a significant turning point in the consolidation effort.

The data shared in Chapter 4 provides evidence of the dire financial and academic challenges both districts were working to address. Given the nature of the budget cuts required to eliminate the operational deficit, there was no question that there would be an associated impact on the quality of educational opportunities available to students. While simply merging the two districts together did not represent a solution to all of the challenges, it afforded the school boards and the larger community the opportunity to step back and imagine what would be possible and what would be desired if they had an opportunity to create a new school system. This was the work that took place during the summer months (see Chapter 5).

Consolidation was a vehicle that represented an opportunity to create something new since both of the former districts ceased to exist at a point certain following the consolidation vote, and a new district emerged. While the financial challenges and community demographics remained, the opportunity to restructure was embraced by community leaders and represented some of the strongest arguments in favor of consolidation based on the EPIC-MRA polling data. The financial challenges were not nearly as convincing as reasons to consolidate as the educational improvements that were proposed. As Post and Stambach conclude in their study of consolidation in Pennsylvania, “One thing is certain: arguments about school district organization...do not turn only on issues of money, as advocates on both sides are wont to maintain. They depend upon the values and experiences communities collectively bring to deliberations about school district organization” (p. 115).

This finding is also consistent with Rogers, Glesner & Meyers (2014) in their exit polling data regarding perceived benefits of consolidation where the top three were to save money (although only 68% of those who identified this as an important benefit actually voted in favor of consolidation), increase opportunities (71% identifying this voted in support of consolidation) and enhance quality (77% of those identifying this voted in support). Although the financial reality is relevant, the more powerful factor in this consolidation relating to garnering community support was the opportunity to create a new educational system. However, as Dr. Joe pointed out in his interview,

I think the easiest part probably was to do it. The hardest part was to implement it. So, my suggestion is that whoever does it have a complete plan. Everything to the t. What would happen after the two school districts become one. (personal communication, January 25, 2016)

Several research participants noted the challenge of the separate districts related to declining enrollment and budget deficits. Efforts were implemented to initiate programs that would attract students, but when both districts were spending money in that effort without any measurable success such as increased student enrollment, implementing changes designed to improve student achievement became particularly challenging. In Balcom's (2013) study of the Twin River Unified School District merger, she highlights the curriculum alignment and grade level configuration opportunities associated with bringing three elementary districts and one high school district together. Coupled with a commitment to high expectations and consistent use of data, she was able to demonstrate the potential consolidation has for addressing the challenges of struggling districts. The redesign envisioned in the Ypsilanti/Willow Run summer visioning work proceeded along a similar path; however, it remains too early to ascertain whether the intentions will produce the desired results.

Process Lessons Learned

In coding and analyzing the key themes that emerged from the interviews of leaders in the process, the code co-occurrence—represented in parenthesis after each theme—in a number of areas clearly illustrate which aspects of the process stood out as the most significant.

- **A third party facilitator is absolutely essential (37).** As previously noted, this was a critical element of the consolidation effort and is supported by the research findings of Fairman and Donis-Keller (2012), Ballin (2007), Chabe (2011) and others.
- **Focus on students (28).** The leaders of the consolidation effort who were interviewed reiterated the driving force behind every decision was “what was in the

best interest of the kids.” What impressed Representative Rogers was the willingness of the leaders in these two communities to take on a politically challenging situation in order to benefit the students, “I felt that that was a very pro-active approach to really help the kids and help the community, instead of saying, we’re going to stay isolated”. The formal structure that was adopted by the boards that guided the work of the Collaboration and Communication Task Force required a determination whether proposed solutions would improve student achievement. Don Garrett was one of the most consistent voices reminding people of the real reason for this effort:

You have to be trusted, and the people on the board have to know that what they’re doing is for the best interest for the kids and not the best for a certain part of the community or a certain part of the city. I think everything has to be based on the kids. (personal communication, February 22, 2016)

This focus was also prominent in the River Ridge consolidation in Wisconsin (Ballin, 2007) as well as in the merger of the Graettinger and Terrill school districts in Iowa (Mart, 2011).

- **Community engagement is critical (22).** The number of community forums and opportunities for individuals to participate not only in the design work of what the consolidated district would look like, but also in asking questions about the process and gathering information before the vote surfaced as one of the most significant aspects of the overall process. It is doubtful that the 61% of voters who supported the effort would have been that high if the community engagement effort would have been less. Ownership of the process and seeing a way forward to a better future for

the children and community was a compelling argument. Representative Rutledge stressed this point:

Number one, there has to be a communication piece that just kind of gets the word out. That this is a possibility. And it always has to be framed in the fact that, we're not at the point where we've drawn conclusions yet, we're at the point of getting input. "What's your input"? People, if they feel that something is a foregone conclusion, number one they won't participate, number two, they'll be very skeptical if they do participate. So the communication piece has to be, has to be there first. And, then secondly, this has to be broad-based. It has to be as wide of an area, in terms of both pockets of the community, you know, for it to get the best input. (personal communication, January 29, 2016)

Mart (2011) addressed community engagement in a number of areas: he suggests that committees should involve supporters and opponents; involvement must include students, staff, faculty, and community; and not making decisions until "ample opportunities for input have been made available" (p. 20). These recommendations are consistent with the process used in the Willow Run and Ypsilanti consolidation and the findings in this study.

- **Leadership matters (21).** When considering why the conversation that was held in 2007 with board members, State Representative Alma Wheeler-Smith, and WISD superintendent Bill Miller, did not produce any meaningful movement toward consolidation, it became clear that at least some of the leaders in the neighboring school districts did not have an interest in pursuing the conversation. It only took one

individual from one of the districts to signal an unwillingness to participate and the conversation ended. Bill Miller's summation of this failed attempt was "leadership matters" (personal communication, February 18, 2016). This reinforces the significance of the convergence of *Kairos* and visionary and courageous leaders who were willing to say "yes" to the emerging opportunities, as essential components of the successful effort.

- **Emphasis on Benefits of Consolidation (20).** The superintendents and board presidents reiterated the importance of conveying the benefits of consolidation to the community. It was not enough to outline the dire financial and academic situation. Dr. Hawkins framed it this way:

There ought to be clear and convincing reasons to consider consolidation as an option. And what's essential to address in this quest is the question of how to convince all of our stakeholders that good benefits for students can exist when consolidation is considered. (personal communication, April 19, 2016)

The educational opportunities that were proposed in creating a cradle to career continuum resonated with the individuals who participated in the EPIC-MRA survey in terms of how convincing those components of the system redesign were. The survey respondents indicated the dual enrollment proposal, which would result in students graduating from high school with a diploma and an associate's degree, was one of the most convincing arguments in support of the consolidation. Additionally, survey respondents saw tremendous potential in the partnerships with the various higher education institutions in the region (Washtenaw Community College, University of Michigan, and Eastern Michigan University) as a strategy for enhancing

educational excellence. While both districts technically could have developed dual enrollment and higher education partnerships on their own, the ability to do so from a practical standpoint was constrained by capacity challenges since so few students met the standards for dual enrollment and the ongoing cuts undermined efforts to innovate. The consolidation was seen as a way to guarantee these options were more widely available. It was clear that residents in both communities were motivated by the potential to preserve and enhance quality educational opportunities for their students. After years of cuts that included increasing class sizes and elimination of programs and electives that high performing schools have available for their students, residents, particularly parents, educators, and business leaders, were eager for the opportunity to build a viable system that included all of these options. Throughout the summer visioning work, these themes were reiterated by community members and parents. They wanted access to current technology, multiple and varied curriculum choices, and opportunities that would prepare their students to compete in a global economy. Consolidation was viewed as an opportunity to make the changes necessary to accomplish this objective. Additionally, because achievement was so low, there was also a recognition that restructuring was necessary in order to address core academic concerns. The benefits of consolidation were articulated in ways that resonated with the community and were more compelling than the inclination to preserve local identity of the former districts if those benefits could be realized in exchange.

- **Trust and transparency (18).** As noted by the leaders interviewed in this study, one of the reasons this process was successful was because of the trust both school

districts and community leaders had in the Washtenaw ISD facilitation. Prior work in both districts was critical in winning over skeptics throughout the developmental phase of the design work. Community leaders saw the ISD as a credible third party with a track record of getting things done such as with the transportation collaborative between Ann Arbor, Ypsilanti, and Willow Run. As the process developed, the base of trust was expanded through a commitment to transparency and openness throughout each aspect of the process.

Additionally, the relationships between the WISD leadership and elected officials were significant with respect to the ability to garner support at the state level with both policy and funding. Specific efforts were undertaken to build trust between the two school boards through the joint board meetings and collaboration and communication task force processes. By making sure board members in both districts were regularly updated on the work of the task force and the steering committee, confidence in the leadership emerged.

Another reason this received such a high rating was because of the trust the Willow Run community had with its leadership team of the superintendent and school board. When the district closed two schools as part of the effort to right-size the district (reviewed in Chapter 4), it was the trust the community had in the leadership coupled with numerous meetings, reflecting a commitment to transparency, that yielded not a firestorm of protest, but community support. These same leaders were the ones who encouraged the community to support the consolidation proposal. The longstanding relationships and trust were key to achieving support from 61% of the community.

- **Communication (17).** A corollary to community engagement is effective communication. This process lesson was also a finding in the Fairman and Donis-Keller (2012) study where they indicated “[E]ffective communication and persuasion are needed” (p. 38). Mart (2011) also suggested “keep the communication flowing. It helps keep the rumors and misinformation at bay” (p. 20). As Representative Bill Rogers noted,

You have to take the time to explain it. The time line being able to talk to your constituents and make sure they understand specifically what’s going on is imperative and it was proven that by taking that kind of time, people will understand. (personal communication, January 15, 2016)

- **Articulating a Vision (16).** This relates to the ability of the leaders in the process to see what is possible and work with the community in order to crystalize what that means for the education of the students. Heath and Heath (2010) in their book *Switch: How to change things when change is hard*, stressed the importance of creating a “destination postcard” that provides a compelling picture of the future (p. 76). While making the case for consolidation by communicating the benefits is important, holding an overarching compelling vision, particularly by leaders in the process, was essential for navigating all of the complexities associated with managing the process and getting to a successful election.

Leadership Lessons

As noted above, leadership was one of the themes that surfaced during the course of the interviews and was highlighted as a process lesson learned. However, it is possible to drill down more deeply into what the participants meant by leadership. Words associated

with the leadership of the consolidation effort included: courage, vision, competent, persistent, tenacity. Dr. Hawkins noted,

The idea of consolidation becoming a viable and realistic option for implementation resulted only after the involvement of the intermediate school district, under the capable and competent leadership of its superintendent Scott Menzel. This was a gargantuan task that resulted in a successful outcome. (personal communication, April 19, 2016)

One of the design pillars for the envisioned new district was an emphasis on “leadership at all levels.” There was a recognition that shared or distributed leadership was essential in moving the system forward. Fairman and Donis-Keller (2012) indicate that “Leadership from the superintendent and others is critical for building support for reorganization” (p. 38). This finding was also noted in the Rogers, Glesner & Meyers (2014) Vermont study where they quoted one of the participants as follows: “It requires people to lead the process whose force of personality, style, wisdom, and kindness have to inspire others...this is education, everything is fraught with process. You need a visionary leader to make it happen” (p. 8).

The courageous leadership exhibited by the two board presidents in initiating the conversation, coupled with the willingness of the two superintendents to contribute to the process in spite of the uncertainty it represented for their careers, is a manifestation of what Jim Collins (2001) referenced as Level 5 leadership:

Level 5 leaders channel their ego needs away from themselves and into the larger goal of building a great company. It’s not that Level 5 leaders have no ego or self-

interest. Indeed, they are incredibly ambitious—*but their ambition is first and foremost for the institution, not themselves.* (p. 21)

Mr. Bates and Representative Rutledge both emphasized their appreciation of and recognition that the two superintendents, Martin and Lisiski, placed the needs of the students and two districts above their own personal ambitions. As Mr. Bates said, “I give our two superintendents a lot of credit for being willing to be courageous enough to support that process.” Their willingness to engage fully in the process was key to taking advantage of the window of opportunity presented as a result of the circumstances they inherited. At the same time, if their board presidents as leaders of the respective boards of education were not prepared to tackle the difficult conversation, the superintendents would not have been in a position to move the consolidation conversation forward. It is the convergence of key leaders, not singular individuals, all of whom were open to considering the possibilities associated with consolidation that resulted in moving from concept to reality.

In reflecting on the eight elements of *Leadership That Matters* (Sashkin & Sashin, 2003), the themes that emerged from this study reflect transformational leadership that met the behavioral traits of communication, trust, and creating opportunities as well as the characteristics of self-confidence, persistence and determination in leading transformational change; empowering orientation; and vision. It is important to note that the leadership traits were reflected across the continuum of superintendents, board presidents, and elected officials. These leadership themes are prevalent throughout the other case studies referenced including Ballin (2007), Chabe (2011), Mart (2011), Fairman and Donis-Keller (2012), and Rogers, Glesner & Meyers (2014). In the final analysis, the process lessons identified above include support for the elements of transformational leadership and underscore the

importance of the behaviors and characteristics of effective leadership that is necessary to produce results.

State Policy Implications and Considerations

The consolidation of Ypsilanti and Willow Run was assisted in critical ways through the support and interaction of key policy-makers. These included State Representative David Rutledge, in whose territory both districts fell; State Representative Bill Rogers, chair of the K-12 Appropriations Committee; and State Superintendent Michael Flanagan. While there were other players at the state level who contributed, it was the active engagement of these three, in partnership with the leadership of the consolidation effort, that signaled the importance of this effort and resulted in policy and funding that were designed to help ensure the consolidation was successful. Each of these individuals can be considered a “policy entrepreneur” in the sense identified by Kingdon (2003), and their contribution to the overall effort should not be underestimated. Among the policy areas that were emphasized by the interview participants:

- **Incentives (20)** The most frequently referenced policy to benefit future consolidations was state incentives. However, it was recognized that money alone was insufficient to motivate people to support consolidation since subsequent to the Ypsilanti/Willow Run consolidation no other districts voluntarily consolidated in spite of the line item in the budget that was available for such purposes. In fact, because no districts consolidated, the State Superintendent sought and received support from Representative Rogers to allocate the funds for shared services so they did not lapse.

- **Financial Incentives**—the \$6 million consolidation grant was referenced as an important factor in the overall consolidation effort. However, this grant award was provided in late December following the vote and not prior to the vote. In order to serve as a true incentive for other communities, knowing what funds are available in advance would be advisable and the amounts should sufficient to be a true incentive.
- **Foundation Formula**—the state modified the formula for consolidated districts ensuring districts received the weighted and blended foundation grant plus \$100 or the higher of the prior districts foundation grant, whichever was less. This formula change ensured there was not a disincentive for consolidating for either district, but it did not result in an increase in the per pupil allocation unless both districts were receiving the minimum foundation grant. However, this formula was changed after the consolidation vote and therefore was always a concern of voters who understood how schools are funded. During the campaign leading to the election many people questioned whether reliance on a “promise” from key legislators was advisable. For future purposes, the per student allocation should be permanently increased with a true incentive for bringing school districts together in advance of any consolidation vote.
- **Feasibility study**—funding for this consolidation during the initial phase was provided through a combination of funds from the two deficit districts, the Washtenaw ISD, and fundraising from community partners. Some of the dollars were recovered when the Washtenaw ISD was awarded the

consolidation grant. However, if the state wants more districts to consider consolidation and/or annexation, providing planning funds to conduct feasibility studies—like New York, Indiana, Iowa, Vermont, Wisconsin, and other states—is an important component to consider.

- **School of Choice/Charters**—School funding in Michigan is driven by student enrollment. The proliferation of charter schools, particularly the number in the Ypsilanti area which number more than ten, coupled with School of Choice, contributed to the economic collapse of the two districts. This policy also endangered the newly consolidated district. During times of change it is not uncommon to see continued student departures as a result of uncertainty about how things will turn out. (See Balcom (2013) regarding the Twin River Unified School District consolidation as an example). Representative Rutledge introduced a bill that would have created a three-year moratorium on any new charter schools within the boundaries of a newly consolidated district. Superintendent Lisiscki noted the benefit of this proposed legislation in her interview. This protection would help ensure merged districts would be somewhat insulated from predatory practices during their infancy, much like a budding plant needs protection from an early frost. Unfortunately, the bill never received a hearing in spite of the best efforts of Representatives Rutledge and Rogers.
- **Leadership**—superintendents who embrace the challenge of consolidation are putting their jobs on the line. In the case of this consolidation, both superintendents had contracts that protected their employment while not necessarily ensuring they would be given the superintendent position. As former State Superintendent Flanagan noted in his interview, there was an ISD consolidation at approximately the

same time as the Ypsilanti and Willow Run unification where the superintendent lost his position as a result of the merger. It seems advisable to have a state policy that would provide some protection for leaders who are willing to step up to the plate and lead an effort that could ultimately result in the elimination of their position.

- In my conversations with elected officials for this study as well as with other elected officials across the State of Michigan, consolidation and annexation continue to be an area of general interest across both sides of the political aisle. It is commonly assumed that we have too many school districts, especially smaller sized districts which lack the ability to provide a full array of curriculum offerings to students. This was a point that was reiterated by the board presidents and elected officials interviewed for this study as well as former State Superintendent Flanagan. The fundamental belief that we have too many districts will continue to lead to policy proposals promoting consolidation or annexation. The irony is that at a time when we now have fewer traditional local educational authorities than we did in 1994, the introduction of charter schools—originally with a capped number, but now with no limit—has resulted in a dramatic swing in the opposite direction (as of the 2014–15 school year there were 900 public schools). Looking at the configuration of districts in 1964 when Public Act 289 was approved, there were 1,438 school districts and the number was reduced by more than 50% to 676 as a result of the efforts on reorganization (Citizens Research Council, 1990). The purpose in establishing the reorganization committees was to address the extensive number of school districts that operated with small number of students and limited grades, most often elementary and/or middle school. With the proliferation of charter schools, many of

which serve students in K-5 or K-8, the number of public education administrative units has increased substantially and is above the lowest number reported of 615 in 1993–94 (Michigan Department of Public Education, 2015).

- State policies should remind districts engaged in potential consolidation votes to focus heavily on new opportunities and benefits for students in both districts and keep that as a focus throughout the consolidation campaign.

Other Recommendations

When asked to think about advice to other boards or communities contemplating the possibility of consolidation, a few items surfaced that are important to emphasize.

- **The process leading to the consolidation vote is challenging, but the more difficult work is implementation.** As key leaders reflected on the process, there was an acknowledgment of the extraordinary time commitment required on the part of leaders to conduct community engagement at the levels noted above. They also pointed out that this was on top of the regular duties for the superintendents of the two districts and the WISD. So while the process was arduous and somewhat doubtful of success, if you use prior consolidation votes in the state of Michigan over the past thirty years as the benchmark, the real challenge was in the implementation of the vision. Mr. Peoples suggested school boards pay attention to the stress and strain on staff who engage in the work.
- **Leadership and staffing plans need to be developed early.** While this lesson was learned as a result of the implementation phase, it surfaced among a majority of the leaders when reflecting on the process. As Dr. Joe framed it, we need “safeguards” in order to ensure the plan is implemented with fidelity. Too many things can unravel

without a clearly articulated plan. Specifically, the research participants noted the challenge of addressing the role of the existing superintendents in the two districts. In situations where one or both may be retiring, or when two districts are sharing a superintendent, this may not present a significant challenge. However, in the case of the Willow Run and Ypsilanti consolidation, neither superintendent was eligible for retirement, and they had no certainty with respect to what consolidation meant for their future job prospects. Both board presidents commented on the need to address this concern early in the process as a lesson learned in retrospect. Mr. Bates noted,

One of the big errors that we made was allowing both superintendents to be in a position to interview for the superintendent's position in the new district. When a consolidation really means that... again, our consolidation meant that we really needed to find new leadership. (personal communication, January 18, 2016)

Dr. Joe suggested that if consolidation meant moving in a new direction, then "Maybe at very beginning, say that all the administrator who are here will not be the person who is doing it, we choose somebody outside at the beginning and bite the bullet" (personal communication, January 25, 2016).

The question of how staff, particularly teachers, will be selected was also raised as an area that should have been dealt with sooner in the process. The failure to do so created some unanticipated challenges in Phase II of the process and the residual effect appears to be continuing throughout the implementation of the consolidation.

- **Process matters.** Upon reflection, the leaders in the process offered very few suggestions for changes to the process from the beginning of the conversations through the vote. This was due, in part, to the successful nature of the venture, although that is

not to say that there weren't some concerns along the way. Mr. Bates noted the dynamic tension in this way:

...there were times when I wanted things to speed up and I just had to remind myself that patience was what was needed. There were times when I thought it was going so fast that we weren't doing it justice, the way I had hoped and I wanted to slow it down. In the end there were times when it was frustrating to me to not have more control over the process. I mean, when we invited the ISD in, one of the things that you did is you gave up some control. It was really, when I think back on it, a tremendous amount of trust that was involved all the way around because we had to trust that what the ISD was doing was well thought out, calculated, and designed to get us to where we were trying to get to, and the ISD had to trust that, after putting in the effort and time and expense, and I know there was considerable expense, that the two school boards would actually support it and weren't going to suddenly back pedal and leave them hanging. (personal communication, January 18, 2016)

Most of the recommended changes suggested by the leaders who were interviewed related to what was learned during the implementation phase rather than the lead up to the vote. For communities who want a road map leading up to a consolidation vote, the process used here may be worth consideration.

Synthesis of Findings Through Conceptual Framework Lens

The Willow Run and Ypsilanti consolidation process yields important insights with respect to the convergence of three critical elements from a theoretical lens. The first relates to the Greek concept of *kairos*. This notion of the right time signifies more than a chronological occurrence, but rather a convergence of many factors that presented an

opportunity for action. In this case, the history of the relationship between the two districts, the state policies in the mid-1990s that impacted funding and enrollment, combined with the financial distress and academic challenges defined the conditions leading to an opportunity. However, as was shown in Chapter 4, under similar circumstances in 2007, the consolidation conversation never gained traction. While there are common elements representing the cyclical nature of history, without decisions by transformational leaders to seize the opportunity, the change does not occur. Transformational leadership is characterized by trust, transparency, vision, and an ability to engage and empower followers in the process. The consolidation effort required both the right conditions and leadership in order to come to fruition.

The concept of policy entrepreneur as outlined by Kingdon (2003) is the third component of the conceptual frame that aids in understanding why this consolidation effort was successful. Without an effort to impact the policy environment at the state level, the local conversations very well may have stalled. Even with the pledges of three policy entrepreneurs—Representatives Rutledge and Rogers, and Superintendent Flanagan—many community members were still doubtful the state would follow through. As Kingdon (2003) noted, the policy window remains open for a very short period of time (p. 166); and for this consolidation effort, remained open long enough to ensure changes in the funding formula as well as provision of a substantial consolidation grant to assist in the process.

Finally, although it was completed after the period of time being studied, the State of Michigan Department of Treasury worked with the two districts to restructure the operational deficit into longer term debt so that on July 1, 2013, the new district emerged free from deficit district status. None of this would have been possible without the convergence of the

right circumstances (*kairos*), transformational leaders, and policy entrepreneurs who were willing to advocate for solutions and validate the hopes and aspirations of the two communities related to creating an educational system designed to provide quality opportunities for children from cradle to career.

Recommendations for Future Research

Given that no template exists in Michigan to guide districts through the consolidation process (although arguably this dissertation represents a first step in outlining pre-consolidation processes that have been effective in at least one situation), it is important to study the remaining phases of the consolidation. Phase II was particularly critical related to all of the components in creating a new district and further defining the specific elements of the vision. Ultimately, it will be important to determine whether the hopes and aspirations of the community that accompanied the consolidation resulted in an improved/viable public education system in Ypsilanti. It was always anticipated that it would take three to five years to determine whether the effort was successful as measured by improved achievement for students and financial viability. This will be an important bookend to the research conducted in this study.

Another potential area for research includes comparing and contrasting the successful consolidation effort with the failed annexation attempt of Whitmore Lake Public Schools by Ann Arbor Public Schools. While there are similarities in how the annexation process was approached there were also several key areas where the experiences were divergent.

This study focused on the lessons learned and policy questions from the perspective of the leaders in the process. In order to gain a more complete view of the consolidation

effort, further studies could also consider the consolidation from the perspective of the staff, faculty, and larger community.

Other possible research would be a multi-case study including this consolidation, the consolidation of Britton-Macon and Deerfield, and the annexation of Albion by Marshall. Lessons learned from these three cases that are present in all three may contribute to future policy.

New research out of Michigan State University indicates that students who participate in School of Choice do not typically outperform students from their district of residence (Cowen, 2016). As noted in Chapter 4, the three-pronged policy innovations in the mid-1990s—Proposal A, charters, and School of Choice—significantly changed the educational landscape. While the stated intention of these policy innovations are defensible, the unintended consequences for urban and small districts created an environment where many students are consigned to districts that do not have the resources necessary to provide a quality education and find themselves in a death spiral much like Willow Run and Ypsilanti prior to consolidation. Given the new research and the announcement of the Governor's Commission on 21st Century Education, perhaps now is a time to revisit these policy innovations in order to ensure every student is able to attend a quality school where he or she lives.

Epilogue

The dream or vision is the force that invents the future.

—Kouzes and Posner

The consolidation effort with Willow Run Community Schools and Ypsilanti Public Schools represented one of the most exhilarating and challenging opportunities of my professional career. As mentioned in Chapter One as well as in Chapter Three, as a participant in the events studied in this dissertation it is important to account for the ways in which my experiences and perspectives influenced the research. In a qualitative study, the researcher is the primary instrument of data collection (Merriam, 1998; Stake, 1995). In this epilogue, I provide some of my own thoughts related to the consolidation effort and note one area that I believe could have been emphasized more prominently. Overall, I concur with the themes that emerged as outlined in the findings and conclusions and my thoughts below represent shades of nuance rather than wholesale departure from the substance of the findings.

As a leader, I am inclined to embrace challenges and to respond in the affirmative when called upon to engage in what others assume may be an impossible task. The opening quote in the Introduction, "When you find yourself beginning to connect with a significant future opportunity, first say yes, then do it, and only then ask whether it's possible" (Scharmer & Kaufer, 2013), reflects the way in which the consolidation effort was pursued. When the two board presidents approached the Washtenaw Intermediate School District to request facilitation assistance, even though the organization was in the midst of a leadership change, the response was to first say "yes" and then to figure out how to make it happen. Throughout the first phase of the process, there was no shortage of individuals who either

believed the communities would never approve a consolidation proposal or who thought that bringing these particular districts together was misguided. In retrospect, it is clear that the doubters regarding the former were proven wrong. The jury is still out with respect to those who questioned the wisdom of combining two struggling districts.

To the question of why the WISD would agree to accept the facilitation role and engage as deeply as we did, it is important to highlight our organizational purpose and commitment. Long before I became superintendent of the Washtenaw ISD, the leadership team embraced a fundamental commitment to equity, inclusion, and social justice. This deeply held value was the basis for key decisions for more than a decade and constituted a moral imperative for those who were part of the WISD team. Because my values and those of the organization aligned, it was easy to say yes to the request from the two board presidents. Many of the WISD team members were engaged at various levels with both districts as they navigated changing state requirements or implemented new initiatives in an attempt to raise achievement for all students. This history of collaboration and partnership, in my estimation, was an important part of the credibility of the organization to serve as a trusted guide or third party facilitator. I hesitate to use the word *neutral* with respect to the facilitation role, in that our commitment was driven by identifying solutions that would improve opportunities and outcomes for students in the Ypsilanti area. As an organization, we were not wedded to a particular outcome at the beginning of the journey, but I believe most of us thought bringing the two districts together, under the right conditions, would provide opportunities that were unavailable given the conditions of both districts at the time the consolidation conversations started.

As we approach five years since the initial conversation in June of 2011, I am cognizant, as were the individuals interviewed for the study, of the work that transpired since that time. Attempting to focus solely on Phase I of the consolidation effort was complicated in some respects because of our knowledge of aspects of Phase II and Phase III that were important, yet outside the scope of the study. As noted in Chapter 8, some of these items still found their way into the lessons learned (e.g., the importance of addressing the leadership question in the first phase rather than waiting as was the case in this consolidation effort). Other lessons will emerge when someone else decides to pick up where this study left off and begins to unpack the extraordinarily complicated and compressed timeline associated with bringing the two districts together as one between November 26, 2012, and July 1, 2013.

Issues of race and class, equity and social justice, emerged as critical elements in designing a unified school district. While the financial challenges and associated cuts in programs, staff compensation, etc. constituted an important backdrop, it was the opportunity to reinvent the public education system in a way that ensured all children in the Ypsilanti area had opportunities to achieve their full potential that was most compelling. After years of decline, budget cuts, churning in leadership at Willow Run, and woeful achievement, the unification of the two districts represented hope—hope for a new beginning and an opportunity to turn things around. As the superintendent of the Washtenaw ISD, I am confronted daily with the disparities within our own county, between those who have advantages and opportunities and those who do not. While these inequities are apparent in the data discussed in Chapter 4 related to the historical background and context, it did not surface as a dominant theme in the interviews with the key leaders in the process. However, the impact of choice and charters, the achievement gap and/or extraordinarily low

achievement, and the demographic incongruity between the school systems and the larger community all signal that this is an important area of focus. There is no question in my mind that it was also a driving force for the key leaders in the process and stands as another point of emphasis to the findings and conclusions outlined in Chapter 8.

As an experienced superintendent completing my fourteenth year and a novice researcher, the opportunity to study the first phase of the consolidation effort afforded me a chance for disciplined reflection and analysis, a rarity in the fast-paced world of educational leadership and reform. Re-engaging with colleagues who were key actors during the span of those eighteen months served as an important reminder of the energy, dedication, passion, and vision that led to bringing the two districts together. Given a review of past consolidation conversations, this process represents a positive deviant or outlier that indeed should be considered as a model for an inclusive and broad-based strategy for engaging communities in the transformation of an educational system. Leadership does not reside in only one individual, although positional leadership is important and can certainly bring progress to a grinding halt if the power is used in such a manner; and when a leadership team that cut across multiple districts and levels of leadership commits to pursuing “all viable options” for improving outcomes for students, amazing things can happen.

It is my hope that my own personal biases with respect to the advisability of consolidation were properly set to the side in the case study. Ultimately, each reader will judge for him or herself whether that is the case. At the same time, because of my role and unique position in the process, I believe the narrative represents a unique window into the levels of engagement within the community, with elected officials and policy-makers, and in both school districts that resulted in significant voter support for the effort.

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APPENDIX A

IRB Determination Letter

RESEARCH @ EMU

UHSRC Determination: EXEMPT

DATE: January 5, 2016

TO: Scott Menzel
Department of Leadership and Counseling
Eastern Michigan University

Re: UHSRC: # [830977-1
Category: Exempt category 2
Approval Date: January 5, 2016

Title: A Case Study of the Consolidation of Ypsilanti Public and Willow Run Community Schools: Lessons Learned and Policy Considerations

Your research project, entitled **A Case Study of the Consolidation of Ypsilanti Public and Willow Run Community Schools: Lessons Learned and Policy Considerations**, has been determined **Exempt** in accordance with federal regulation 45 CFR 46.102. UHSRC policy states that you, as the Principal Investigator, are responsible for protecting the rights and welfare of your research subjects and conducting your research as described in your protocol.

Renewals: Exempt protocols do not need to be renewed. When the project is completed, please submit the **Human Subjects Study Completion Form** (access through IRBNet on the UHSRC website).

Modifications: You may make minor changes (e.g., study staff changes, sample size changes, contact information changes, etc.) without submitting for review. However, if you plan to make changes that alter study design or any study instruments, you must submit a **Human Subjects Approval Request Form** and obtain approval prior to implementation. The form is available through IRBNet on the UHSRC website.

Problems: All major deviations from the reviewed protocol, unanticipated problems, adverse events, subject complaints, or other problems that may increase the risk to human subjects or change the category of review must be reported to the UHSRC via an **Event Report** form, available through IRBNet on the UHSRC website

Follow-up: If your Exempt project is not completed and closed after **three years**, the UHSRC office will contact you regarding the status of the project.

Please use the UHSRC number listed above on any forms submitted that relate to this project, or on any correspondence with the UHSRC office.

Good luck in your research. If we can be of further assistance, please contact us at 734-487-3090 or via e-mail at human.subjects@emich.edu. Thank you for your cooperation.

Sincerely,

Beth Kubitskey
Chair
College of Education Human Subjects Review Committee

APPENDIX B

Chronology of Key Dates

June 15, 2011	Initial meeting at WISD to request facilitation of conversation between the two districts
August 24, 2011	Joint board meeting (facilitated by Greg Peoples) with two resolutions adopted outlining commitment to work together and establishing the Collaboration and Communication Committee.
September 19, 2011	First Collaboration and Communication Committee (monthly meetings); established norms and processes for working together.
September 27, 2011	Meeting held in Lansing (convened by Representative Rutledge) to discuss Strategies to Address Challenges for Struggling School Districts in Washtenaw County (launch of statewide work to support the effort of the two districts).
November 21, 2011	CCC formally recommends merging the bus garage—first formal recommendation to full boards as a result of the work of the committee.
March 19, 2012	CCC meeting with presentation on potential for unification—first time the conversation moved to the concept of <u>unification</u> . Two recommendations were approved at this meeting—one to take the next steps on a possible consolidation vote and the other on continued shared services opportunities.
April 9, 2012	Meeting in Lansing with State Superintendent Mike Flanagan (along with Dedrick Martin, David Bates, Laura Lisiscki, Don Garrett, and Scott Menzel).
April 16, 2012	2 nd Joint Board meeting. Both boards voted to authorize next steps in proceeding toward consolidation, but called for a plan for unification before finalizing a decision to place the question on the ballot. YPS 7-0 vote; WRCS 5-2 vote.
June-July 2012	Visioning process including data dialogue sessions, two-day facilitated workshop with Lead and Learn; community forums and development of a vision for a new unified district.
July 30, 2012	CCC recommends proceeding to a consolidation vote based on having met the criteria established in April.

- August 8, 2012 3rd Joint Board meeting. Voted to place the consolidation question on the November ballot. Representatives Rutledge and Rogers along with State Superintendent Flanagan attended and addressed the board.
- Aug-Nov 2012 Informational and advocacy campaign for the consolidation. EPIC-MRA Survey indicated likely success.
- September 12, 2012 WISD board established criteria for new board members if consolidation is successful (pursuant to requirement for the WISD to appoint the new board following the election).
- November 6, 2012 Successful consolidation vote (61% in both districts approve). Vote on the Non-homestead millage authorization was much closer, but still passed.
- November 19, 2012 WISD Board appoints seven school board members (three from the prior districts and four who were not former board members).
- November 26, 2012 First meeting with the newly appointed board members. Beginning of Phase II.

APPENDIX C

Sample Interview Protocol

Thank you for agreeing to participate in the research study of the Ypsilanti Public and Willow Run Community School Consolidation effort. Prior to the interview it may be helpful to review the preliminary questions along with a review of key dates/actions during the time period being studied.

Each interviewee will be asked for name, title, and role they were in during the consolidation effort (June 15, 2011-November 26, 2012).

The initial questions are as follows:

- Looking back on your role in the consolidation process, talk me through the key events that led you to the decision that consolidation was the best path to take for the two districts.
- Can you share why you started talking initially and what you envisioned at the time you requested the meeting with me? Please talk about the situation in their community/school district and on your board that will help paint the picture of the reality that existed at the time these conversations got underway.
- Looking back at your own role in the consolidation process, what was a key learning about the discussions that led up to consolidation.
- Thinking back on that overall experience from June 15, 2011-November 26, 2012, what lessons would you identify that could be useful for other school boards and communities considering consolidation? Anything that you would recommend be done differently?
- Again, reflecting on your experiences in this process, what policies were helpful and what policy changes could be enacted that would be beneficial for future consolidation conversations in Michigan?
- In what ways did the consolidation effort promote whole district redesign? Were changes made possible through the consolidation that were not possible as independent districts (and if so, what were they)?
- What were your perceptions of the role of the WISD in the process (specifically thinking about the facilitation of the communication and collaboration committee; the visioning sessions; and the informational campaign/community forums related to the consolidation vote)?

APPENDIX D

**Resolution A: 8-24-11
Collaboration & Communication Task Force Formation**

Whereas both the Willow Run and Ypsilanti Boards of Education have previously passed resolutions affirming efforts to explore sharing services, and,

Whereas they have reaffirmed their commitment to pursue all viable options to maximize learning opportunities for all students in our community by holding this joint meeting, and,

Whereas this is a continuation of work that our districts have been doing for years (as evidenced by the number and types of shared services in which our districts currently participates such as special education, the countywide fiber network, the WAY-Washtenaw Program, and busing), and,

Whereas, in the 2011-2012 school year, our superintendents and staff representatives will be exploring collaborative and consolidated services in the areas of common software, human resources, career and technical education, and business services, and,

Whereas both districts wish to continue to:

- minimize the impact of shrinking dollars on programs and services in order to maximize educational opportunities for students and families.
- improve our effectiveness.
- maximize available resources.
- achieve viable efficiencies and economies of scale.
- benefit from the power of working together.
- preserve community control of our local schools.
- be good stewards of taxpayer dollars.

Now, therefore, be it resolved that a joint task force for Collaboration and Communication be formed consisting of two members each from both school boards as well as superintendents and staff members from both school districts to explore and recommend additional opportunities for collaboration and sharing between the two districts.

And, further, that said task force will be facilitated by staff from Washtenaw Intermediate School District meeting regularly during the 2011-12 school year and reporting on its progress quarterly to both Boards of Education and Representative David Rutledge.

And, furthermore, that the Willow Run and Ypsilanti Boards of Education will take specific action on task force recommendations per the attached Communication and Collaboration Process.

Roll Call Vote:

Willow Run Members:

Ypsilanti Members:

Members Absent:

August 24, 2011

APPENDIX E

**Resolution B: 8-24-11
Collaboration & Communication Task Force Appointments**

Whereas a joint task force for Collaboration and Communication has been formed to consist of two members each from the school boards of both Willow Run and Ypsilanti as well as superintendents and staff members from both school districts, as needed, to explore and recommend additional opportunities for collaboration and sharing between the two districts, and,

Whereas the said task force will be facilitated by staff from Washtenaw Intermediate School District meeting regularly during the 2011-12 school year and reporting on its progress quarterly to both Boards of Education and Representative David Rutledge,

Now therefore be it resolved that the following members from the:

- Willow Run Community Schools Board of Education

- Ypsilanti Public Schools Board of Education

be appointed to serve on the Collaboration and Communication Task Force for the 2011-2012 school year.

Roll Call Vote:

Willow Run Members:

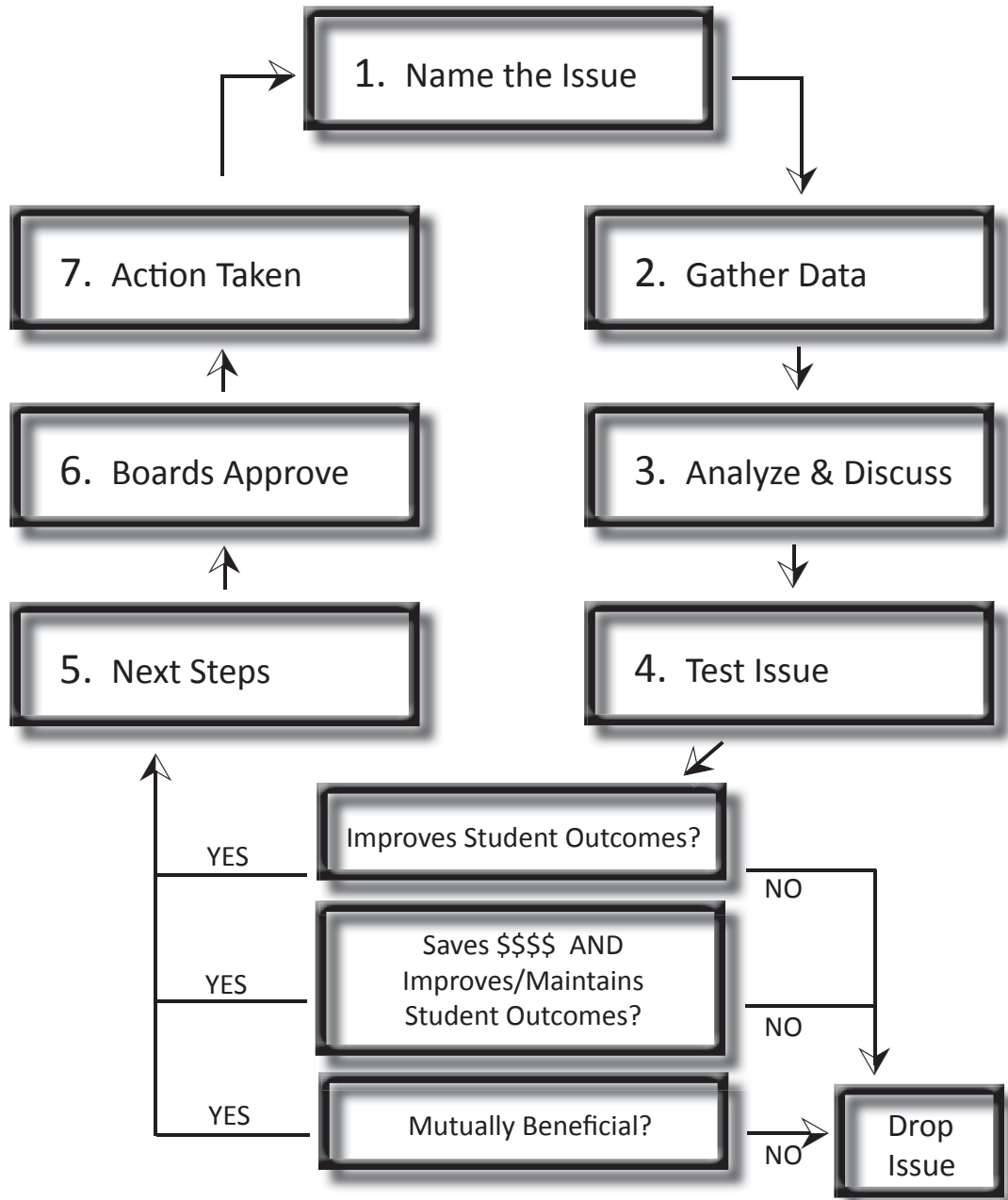
Ypsilanti Members:

Members Absent:

August 24, 2011

APPENDIX F

WILLOW RUN AND YPSILANTI SCHOOL BOARDS' COLLABORATION AND COMMUNICATION PROCESS



APPENDIX G

Strategies to Address Challenges for Struggling School Districts in Washtenaw County



David E. Rutledge
Michigan House of Representatives
District 54

988 Anderson House Office Building
P.O. Box 30014
Lansing, MI 48909
Phone 517-373-1771
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davidrutledge@house.mi.gov

Assistant Minority Whip
Committees
Education
Local, Intergovernmental and
Regional Affairs
Regulatory Reform

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Strategies to Address Challenges
for Struggling School Districts in Washtenaw County
Meeting Notes

Tuesday, September 27, 2011

- Present:** Dan Hanrahan, MDE Office of State Aid and School Finance
Lisa Hansknecht, MDE Legislative Liaison
Kate McAuliffe, Michigan Association of ISD Administrators
Scott Menzel, Superintendent of Washtenaw Intermediate School District
Glenda Rader, MDE Office of State Aid and School Finance
Rep. Bill Rogers, District 66
Bill Rustem, Strategic Policy, Office of Governor Rick Snyder
Rep. David Rutledge, District 54
Carol Wollenberg, MDE Deputy Superintendent
- Staff:** Emily Arents, Office of Rep. Rutledge (recorder)
Meghan Lizotte, Office of Rep. Rogers

Status Update

Rep. Rutledge and Supt. Menzel provided an update about the efforts of Willow Run Community Schools (WRCS) and Ypsilanti Public Schools (YPS) to share services and reduce costs during recent years. Both districts have had schools on the Persistently Low-Achieving list, and have submitted Deficit Elimination Plans to the MDE.

Both the Washtenaw ISD and Rep. Rutledge have facilitated conversations between the superintendents, school board presidents, education association representatives to find ways to reduce costs, share services and collaborate where possible. The process has come about organically from the districts. Rep. Rutledge shared the budgetary changes made by both districts:

WRCS Changes Made

\$382,000 net reduced spending

- 4.4% reduction for teachers and administrators
- 14% reduction for AFSCME #3451 for last quarter
- \$250,000 transportation reductions
- \$100,000 reduction in transferred for athletics
- Elimination elementary or middle school libraries

Office of Rep. David Rutledge

YPS Changes Made

- \$1.7 million in health care reductions for all staff (annual caps instituted)
- \$250,000 transportation reductions
- \$326,131 eliminated academic coordinators
- \$320,000 instructional staff reductions
- \$873,475 YSSA settlement

Shared Services

- ROTC programs consolidated to YPS
- Movements toward shared business office functions (although districts have separate software systems; WISD is considering a county-wide solution)

The first joint school board meeting was held in late August, at which time a Task Force was formed to provide reports on future ways to collaborate and share services in the short and long terms. The Task Force has completed its first meeting, and its first report will be available in January. Lincoln Consolidated Schools (LCS) recently had a school added to the PLA list, and there has been some discussion about including that district into the conversation about regional solutions toward academic success.

Possible Solutions

There was discussion about possible ways to make it easier for districts to share services toward gradual consolidation, such as providing incentives, or removing disincentives (it can be easier for districts to liquidate than consolidate). The largest obstacle is the districts' debt; without removing the debt, two struggling districts will become one struggling district. There was also discussion about the importance of fairness, and whether certain programs should be made available only to financially struggling districts. The role of charters, new tools like international baccalaureate programs, magnet school models, and possible statewide business software were discussed. Ms. Hansknecht noted that there is a precedent for the state providing one-time resources for costs related to consolidations, and this model could easily be applied to implementing a statewide software system.

Obstacles

- The high school curricula for WRCS and YPS have identical standards (from statewide requirements), but are very inconsistent.
- If the schools on the PLA list do not show a clear trajectory of improvement, they are at risk of entering the Education Achievement Authority (EAA).
- Regardless of shared services progress, there remains the issue of already decreased enrollment. There is a need to consider new uses of existing buildings, perhaps through partnerships with local businesses, organizations (example: public library or community center).
- Community support for movement toward consolidation has not been formally assessed. After assessment, education is needed on what would happen without any change (district failure).

Strengths/Assets

- There are multiple models that could prove successful, as many quality and innovative programs are already going on elsewhere in the county.
- Both WRCS and YPS have begun the process of honestly evaluating what is working, and what needs to be changed. The length of time that both have been on the PLA list has forced tough conversations.
- Both districts are motivated toward making necessary changes, and the ISD will serve as an impartial facilitator.
- School Improvement Grant (SIG) resources can be very helpful, and are easily shared between districts. The program provides professional development experience.
- MAISA has a grant program for coaches assigned to districts to provide support through MDE (follow-up per Ms. Hansknecht: both districts already have coaches assigned).
- Continuing education programs could be considered.
- Debt could be addressed by a longer low-interest repayment plan as an incentive. There would have to be major strings attached, and the change would be made deliberately (should be a "hammer," not just strings).
- The short-term incentive revolving fund used for local governments (about \$5 million) could be adapted for use in districts on a short-term basis, for those ready to make a change.

Next Steps

- MDE will find out what resources are already available to WRCS and YPS, and which new programs might work for training and hands-on assistance.
- Rep. Rutledge will continue to meet with both superintendents regularly, will figure out a way to complete a survey to assess community attitudes on the topic.
- Rep. Rogers asked that the Task Force report slated to come out in January be shared with all present, so that the group could reconvene at that time. In the meantime, considering long-term solutions for all districts in the state (such as statewide software system) is important.
- Mr. Rustem stated that discussions about some revolving fund for districts should be explored. If districts are looking to make major changes to improve and consolidate, the state should be willing to help make it happen.

APPENDIX H

Resolution 4-16-12 Establishment of Intent to Move Toward Unification

Trustees Snedacar Horne and Devaney accepted the friendly amendment and action on the amendment was recorded as follows by the Ypsilanti Board of Education: 7/Yes;0/No.

Trustees Stewart and Wilde accepted the friendly amendment and action on the amendment was recorded as follows by the Willow Run Board of Education: 7/Yes;0/No.

**A motion was made by Trustee Snedacar-Horne, supported by Trustee Devaney:
A motion was made by Trustee Stewart, supported by Trustee Wilde:**

11-12
9473 **Whereas**, both the Willow Run and Ypsilanti Boards of Education are committed to pursuing all viable options to maximize learning opportunities for each and every one of our students, and
Whereas, on August 24, 2011 the boards of education officially formed a joint Collaboration and Communication Task Force to explore and recommend additional opportunities for collaboration and sharing between the two districts, and
Whereas, said Task Force has been meeting monthly during the 2011-12 school year and reporting on its progress quarterly to both Boards of Education and Representative David Rutledge, and
Whereas, the Willow Run and Ypsilanti Boards of Education have taken action on previous Task Force recommendations made per the Communication and Collaboration Process, and, have merged their Air Force JROTC programs and are in the process of merging their transportation facilities and the oversight of their special education services, and
Whereas, this is a continuation of work that our districts have been doing for years, as evidenced by the number and types of shared services in which our districts currently participate, and
Whereas, on March 19, 2012, the Task Force recommended that the question of school district consolidation be placed on an upcoming ballot, and that this recommendation be discussed at a public, joint board meeting on April 16, 2012, and
Whereas, the boards of education recognize there are many issues and challenges associated with bringing together two deficit districts that also have high schools on the persistently low achieving list, and
Whereas, the two communities are facing declining enrollments, shifting demographics, a tenuous political environment and a challenging economy, and
Whereas, the decision to unify the two districts rests solely with our school electors, and
Whereas, both districts are committed to raising student achievement, and to developing an educational system that values and is committed to ensuring the success of every student, and believe that unifying the two districts has the potential to achieve that end if provided with appropriate support from community partners and the Michigan Department of Education.
Now, therefore be it resolved that the question of bringing the school districts of Willow Run and Ypsilanti together to form a new, unified education system be placed on a ballot to be considered by the electors of each district at such time as recommended by the Task Force, and supported by an appropriate resolution properly passed by each board, and only after the two communities and two boards of education collaborate to establish a clear and detailed plan with broad participation for the development and implementation of a unified education system that is adequately supported by specific legislative and financial incentives so as to

reasonably ensure the achievement of rigorous academic standards for all students and the financial viability of the new district.

A Roll Call Vote on the amended resolution was recorded as follows:

Willow Run Members: Meadows/No; Myers/Yes; Stevens/No; Stewart/Yes; Thomas/Yes; Wilde/Yes; Garrett/Yes;

Ypsilanti Members: Berman/Yes; Champagne/Yes; Devaney/Yes; Fanta/Yes; Jackson/Yes; Snedacar-Horne/Yes; Bates/Yes;

Following the vote Trustee Stewart stated that the action taken by the boards of education is not a vote to consolidate but a vote to probe deeper into the benefits of consolidation and to ensure that consolidation is in the best interest of both districts.

Next Steps

Laura Lisiscki, Willow Run Superintendent, noted that tonight’s meeting and resolution adoption was the first step in the process and the questions asked tonight will be answered. She reported the Task Force will continue its work and a plan for community engagement and communication with internal and external stakeholders will be developed. Superintendent Lisiscki said a timeline will be established and activities planned to develop the best unified education system for students.

Dedrick Martin, Ypsilanti Public Schools Superintendent, stated subcommittees will be established to help with the creation of a plan to unify the school systems. He said the plan is to work with members of the community, external and internal stakeholders, and develop a unified district that honors the history of both districts and provides new educational opportunities for students. Superintendent Martin said help is needed to communicate with all stakeholders and develop a plan for the referendum vote.

President Garrett thanked both Superintendents for their work conducting business in trying times and making the best out of the current situation.

Public Comment



Don Garrett, Willow Run Board President and David Bates, Ypsilanti Board President, opened the floor for public comment. President Garrett stated public comment was limited to three minutes or less and asked audience members to fill out a comment card.

Representative David Rutledge

Representative Rutledge thanked and congratulated the Boards of Education for their action. He encouraged the Superintendents and Board members to look beyond themselves to move the process forward. Representative Rutledge also thanked Scott Menzel, Washtenaw Intermediate School District Superintendent, for his leadership and providing communication between the districts and the State Board of Education. He stated each district’s history should be respected and preserved. Representative Rutledge said if the consolidation effort moves forward he would like to assist in providing funds to the districts that are available in the Governor’s budget.

APPENDIX I

List of Meetings and Locations for Visioning Process

 Community Meetings on the Unification of the Willow Run & Ypsilanti School Districts 			
All sessions are open to the public. For more details, call 734.994.8100 x1321 or x1301.			
Meeting Topic	Date	Time	Location
Session #1 Visioning This visioning session will be offered 5 different times at locations throughout the community that seat 50-60 people. This interactive session will gather input from community members about the hopes and aspirations they have for their children and the kind of learning experiences children should have in our public schools.	Sat., 6/23/2012	10AM-NOON	Ypsilanti District Library, 5577 Whittaker Rd., Ypsilanti
	Mon., 6/25/2012	6-8 PM	Willow Run Kaiser School, 670 Onondaga Ave., Ypsilanti
	Thurs., 6/28/2012	6-8 PM	Superior Township Hall, 3040 N. Prospect, Ypsilanti
	Sat., 6/30/2012	10AM-NOON	Ypsilanti District Library, 5577 Whittaker Rd., Ypsilanti
	Mon., 7/9/2012	6-8 PM	Perry School, 550 Perry Street., Ypsilanti
Meeting Topic	Date	Time	Location
Task Force Meeting-Data Portraits	Tues., 7/10/2012	5:30-7:30 PM	Ypsilanti Public Schools-room TBD
Session #2 Data Portraits This data session will be offered 3 different times at locations that seat 80-100 people. This session will take a closer look at educational data, assets and community trends for the two school districts. It will also provide feedback on the community vision statements gathered from the Session #1 meetings.	Wed., 7/11/2012	1-3 PM	Ypsilanti District Library, 5577 Whittaker Rd., Ypsilanti
	Sat., 7/14/2012	10AM-NOON	Superior Township Hall, 3040 N. Prospect, Ypsilanti
	Mon., 7/16/2012	6-8 PM	Ypsilanti Township Board Room, 7200 S. Huron River Dr., Ypsilanti
Meeting Topic	Date	Time	Location
Task Force Meeting-Strategic Design Session #3 Strategic Design This 2-day work session will explore different options for school and district designs that reach the community vision outlined in Session #1. The location will seat 120 people.	Wed., 7/18/2012 AND Thurs., 7/19/2012	(ALL DAY) 8:30 AM- 3:30 PM (both days)	Location to be determined
Meeting Topic	Date	Time	Location
Task Force Meeting-Draft Plan Review	Mon., 7/30/2012	5:30-7:30 PM	Location to be determined
Session #4-Draft Plan Review The draft design plan will be presented on 2 different days in a location that seats 100 people. Participants will give their feedback on the design plan.	Mon., 8/6/2012	6-8 PM	EMU Student Center (Rm 310A), 900 Oakwood St., Ypsilanti
	Tues., 8/7/2012	6-8 PM	EMU Student Center (Rm 310A), 900 Oakwood St., Ypsilanti

APPENDIX J

Collaboration and Communication Task Force Resolution—July 30, 2012

*Recommendation of the Collaboration and Communication Task Force
Consolidation of School Districts
July 30, 2012*

Whereas both the Willow Run and Ypsilanti Boards of Education considered the financial constraints of both school districts and, wishing to affirm their commitment to pursue all viable options to maximize learning opportunities for all students in our community, formed the Collaboration and Communication Task Force, and,

Whereas both boards approved a resolution to place the question of consolidation on a future ballot following the establishment of a clear and detailed plan for the development and implementation of a unified education system in collaboration with both boards and the community that that is adequately supported by specific financial and legislative incentives so as to reasonably ensure the achievement of rigorous academic standards for all students and the financial viability of the new district, and

Whereas, a series of meetings were held during the summer with members of the community and board that resulted in the development of a clear and detailed plan for the development and implementation of a new unified education system, and

Whereas State Superintendent Michael Flanagan has expressed his support for the unification and pledged to use his authority to assist in successful implementation, and

Whereas State Representatives David Rutledge and Bill Rogers have pledged their support by proposing legislation that would foster a successful environment for a new, unified district, and,

Whereas the State School Aid Act includes \$10 million dollars for consolidation that will be allocated by the Michigan Department of Education, and

Whereas the A2Y Chamber of Commerce, and the Ypsilanti Area Ministerial Alliance, the NAACP and the Eastern Leaders Group have expressed their support for the consolidation of the two districts, and

Whereas the financial and academic challenges facing each district necessitate immediate action in order to avoid the appointment of an emergency manager and ensure the local community retains control of its schools,

Now, therefore, be it resolved that the Collaboration and Communication Task Force recommends that each board approve a resolution calling for a public vote on the question of consolidation on the November 6, 2012 ballot.

APPENDIX K

Resolution to Place Consolidation on November Ballot

Whereas, on April 16, 2012 the Willow Run and Ypsilanti Boards of Education voted to place the question of consolidation on a future ballot following the establishment of a clear and detailed plan for the development and implementation of a unified education system in collaboration with both boards and the community that that is adequately supported by specific financial and legislative incentives so as to reasonably ensure the achievement of rigorous academic standards for all students and the financial viability of the new district , and,

Whereas, the districts, in collaboration with the Washtenaw Intermediate School District, convened public forums in June-July to inform and obtain feedback from the community regarding the critical components of a unified school district, culminating in the July 18-19, 2012 District Design Session where those ideas were formalize, and,

Whereas, five domains were identified as the framework for the new educational system to build the structure of a progressive and unique school district which was presented to the community in three public meetings, and,

Whereas, State Superintendent Michael Flanagan has expressed his support for the unification and pledged to use his authority to assist in successful implementation, and

Whereas, State Representatives David Rutledge and Bill Rogers have pledged their support by proposing legislation that would foster a successful environment for a new, unified district, and,

Whereas, the State School Aid Act includes \$10 million dollars for consolidation that will be allocated by the Michigan Department of Education, and

Whereas, the A2Y Chamber of Commerce, the Ypsilanti Area Ministerial Alliance, the NAACP and the Eastern Leaders Group have expressed their support for the consolidation of the two districts, and

Whereas, the financial and academic challenges facing each district necessitate immediate action in order to avoid the appointment of an emergency manager and ensure the local community retains control of its schools, and,

Whereas, the Willow Run and Ypsilanti Collaboration and Communication Task Force voted unanimously on July 30, 2012 to recommend to the full Boards of Education that the question of district consolidation be placed on the November ballot.

Now, therefore, be it resolved that the Willow Run Community Schools and Ypsilanti Public Schools Boards of Education authorize placing the question of consolidation on the November 6, 2012 ballot to be considered by the electors of each district.

APPENDIX L

Willow Run-Ypsilanti Unification Communication Initiatives

Event/Meeting	Date	Location	Completed
Eastern Leaders Group	June 13, 2012		X
Visioning/Data Portraits/District Design	June 18-Aug.7	Various community locations including schools, library, township halls	X
Flyer distribution	July 3-8	Churches, restaurants, Westridge Mobile Home Park, Normal Park, Coleman’s Farm Market, Laundryland, Eagles Club, Big Sky Diner	X
July 4 Parade	July 4	Downtown Ypsilanti	X
Coffee Klatch	July 9	Tim Horton’s –Michigan Ave at Hewitt	X
Chamber of Commerce	July 10, 2012		X
Ministerial Alliance	July 16, 2012		X
NAACP	July 19, 2012		X
EPIC Survey	July 28-Aug. 8		X
Ypsi Rotary	July 30	EMU Student Center	X
Retired Educators	Aug 1	Bomber Restaurant	X
WEMU Radio	Aug 1	Interview with Supt.	X
Ice Cream Social	Aug 1	Normal Park	X
WLBY Radio	Aug. 9	Lucy Ann Lance Show	X
WWJ Interview (consolidation)	Aug. 10		X
WUOM Interview	Aug. 10		X
West Willow Picnic	Aug. 11	Flyers dispersed	X
Hope Clinic	Aug. 16	Flyers posted	X
Heritage Festival	Aug. 17-19	Riverside Park	X
West Willow Neigh. Assoc.	8 p.m. Aug. 20	West Willow	X
Parkridge Fest/Joe Dulin Comm. Picnic	11-2 Aug. 25	Parkridge Center, Ypsilanti South Side	X
WR/YPS orientations/registrations	August	YHS, YNT, WRHS, YMS, WRMS	X
Information Posters	August 2012	Copies displayed in all school buildings	X
Joint Willow Run-YPS Staff meeting	August 30, 2012	Willow Run High School	X
Holmes Rd. Neighborhood Watch	Sept. 11, 6:30 pm	Sheriff substation on Holmes Rd.	X
Gault Village Neighborhood Watch meeting	Sept. 24, 7 p.m.	St. Matthew’s United Methodist Church, 1344 Borgstrom, Ypsilanti	X
YPS Retired Educators Meeting	Sept. 27, 5 p.m.	YPS Admin Building	X
Ecorse Rd. Neighborhood Watch	Oct. 2, 6:30 p.m.	Calvary Baptist Church fellowship hall, 1007 Ecorse Rd., Ypsilanti 48198	X
Community Block Party	Oct. 6, 1-3 pm	1515 S. Harris Rd., Ypsi	X
Pulpit Visits	October 7, 10:45	Second Baptist	X
	October 14, 11:15	Messias Temple	X
	October 21, 11:00	Strong Tower Ministries	X

Staff/PTO Meetings	October-various	Scott Menzel attended smaller staff meetings & parent meetings to update and inform regarding consolidation	X
Public Forums	Oct. 10, 7 p.m.	Christ Temple Baptist, 2372 Holmes Rd., Ypsi	X
	Oct. 11, 6:30 pm	Community CofG, 565 Jefferson St., Ypsi	X
	Oct. 24, 6:30 p.m.	Ypsilanti Library-5577 Whittaker Rd.	X

APPENDIX M

New Board Selection Criteria and Process

Selection Criteria and Process for Appointing the Unified Ypsilanti/Willow Run School District Board of Education

380.861 Appointment of board; filing acceptance of office and affidavit of eligibility; election and terms of board members.

Sec. 861. Within 10 days after the date of the official canvass of the consolidation election, the intermediate school board of the intermediate school district containing the territory of the consolidated school district shall appoint school electors of the school district in the number required by section 11a to act as a board for the school district. This board shall continue to operate the affected school districts as separate school districts until the effective date of the consolidation. If a consolidated school district includes territory in more than 1 intermediate school district, the appointment shall be made by the intermediate school board of each intermediate school district acting jointly as a single board. Within 7 days after appointment, each member shall file with the intermediate superintendent an acceptance of the office, accompanied by a written affidavit setting forth the fact of eligibility for office. Each appointed board member shall hold office until January 1, or, if the consolidated school district's regular election is in May, until July 1, next following appointment. A new board shall be elected at the first regular school election held after the effective date of consolidation in the manner prescribed by law for the election of a first board.

History: 1976, Act 451, Imd. Eff. Jan. 13, 1977; Am. 1977, Act 43, Imd. Eff. June 29, 1977; Am. 2003, Act 299, Eff. Jan. 1, 2005; Am. 2008, Act 1, Imd. Eff. Jan. 11, 2008.

Process and Timeline

- August 8, 2012 The Ypsilanti and Willow Run Boards of Education voted to place the question of district consolidation on the November 6, 2012 ballot.

- August 21, 2012 The WISD Board of Education initiated conversation about criteria and process for selecting a seven-member board of education for a new unified district if the voters approve consolidation.

- September 2012 The WISD Board of Education will review an initial draft of the proposed criteria. The draft will be shared with each board of education as well as posted publicly for general community input.

- October 2012 The WISD Board of Education will finalize the process and criteria and will encourage qualified and interested individuals to complete an application to be submitted on or before November 6.

- November 6, 2012 If the consolidation is approved, the WISD Board of Education will proceed with screening and interviewing of applicants to serve on the new school board.

- November 2012 The WISD Board of Education will conduct public interviews on November 12th and November 13th. The appointment of the seven individuals will take place at the November 19, 2012 WISD special board meeting.

The new board will assume responsibility for each school district until June 30, 2013 at which time the consolidation becomes effective.

Due to changes in election law, the appointed board will serve until December 31, 2014. All seven seats will be on the November 2014 ballot (for staggered terms). The elected board will take office on January 1, 2015.

Criteria for Selection

Candidates must meet the legal requirements to serve on the board (i.e. must be a citizen of the United States and be a registered and qualified elector of the district—in this case the individuals must reside within the boundaries of either the Ypsilanti or Willow Run School districts). MCL 168.302

It is the intention of the WISD Board of Education to select the most qualified individuals who will provide leadership and direction for the new unified district as outlined in the design document. The WISD Board of Education will take the following criteria into consideration when appointing individuals to serve on the new board:

- Involvement in the communities that have joined together to create the new district.

- Background, skills and experience, including but not limited to:
 - Education--including early childhood, K-12, post-secondary education
 - Community service
 - Community leadership including board or governance experience
 - Financial
 - Business
 - Public health

- Clear commitment to the vision, core values and essential domains for the new district as outlined in the planning documents that were created during the summer of 2012.

It is the policy and commitment of the Washtenaw Intermediate School District not to discriminate on the basis of race, sex, age, color, national origin, religion, marital status or handicap in its educational programs, activities, admissions, or employment policies in accordance with Title IX of the 1972 Educational Amendments, executive order 11246 as amended, Section 504 of the Rehabilitation Act of 1973 and all other pertinent state and Federal regulations.

The WISD Board of Education reserves the right to waive any aspect of the criteria/application process deemed necessary in order to ensure the appointment of seven highly effective leaders to serve as the first board of the new district.

Application Process

Candidates should submit the following items:

- Resume
- Statement of Interest
- Three to five references/letters of recommendation

Applications should be mailed to:

Washtenaw Intermediate School District
Attention: Superintendent's Office
1819 South Wagner Road
PO Box 1406
Ann Arbor, MI 48106-1406

Questions about the application process or criteria should be directed to the WISD Superintendent, Mr. Scott Menzel at (734) 994-8100 ext. 1301 or by email at smenzel@wash.k12.mi.us.

Application materials must be submitted no later than the close of business on Tuesday, November 6, 2012.

All applications are considered public information and the names of interested individuals along with the supporting documentation may be requested by and delivered to interested citizens (including members of the media).

APPENDIX N

Unified District Board Candidates

**Unified District Board Candidate Interviews – Willow Run High School
November 12, 2012**

Maria Sheler-Edwards - 6:00 p.m.

EDUCATION: BA English, U-M; MA Written Communications, EMU
 OCCUPATION: Communication Specialist
 EXPERIENCE/COMMUNITY SERVICE: 15 years experience in communications and public relations; former candidate, Ypsilanti Township Board of Trustees; Co-chair of the Friends of Education Committee for District Consolidation
 RESIDENCE: YPS district

Scott Elliott – 6:20 p.m.

EDUCATION: BA Political Science, Baldwin-Wallace College; Infant Studies Certificate, Erikson Institute; M.Ed. Child Development, Erikson Institute
 OCCUPATION: Early Childhood Education Specialist, STG International
 EXPERIENCE/COMMUNITY SERVICE: 15 years experience with early childhood education; serving on various boards including Child Care Network, Nicaragua Project, Family Book Club, Ypsilanti Otters Swim Club
 RESIDENCE: YPS district

Gregory Johnson – 6:40 p.m.

EDUCATION: BA History, Knox College; MA Modern American History, Purdue University; MLS Information Sciences, University of North Carolina
 OCCUPATION: Educator
 EXPERIENCE/COMMUNITY SERVICE: Freelance Grant Writer; Collegiate Instructor; digital library services; Ypsilanti Zoning Board of Appeals; College Heights Neighborhood Assoc.; former board member Toledo’s Attic Museum and The Adult Learning Exchange
 RESIDENCE: YPS district

Kristine Thomas – 7:10 p.m.

EDUCATION: Washtenaw Community College; Community College of the U.S. Air Force; I.B.E.W. #252 Apprenticeship; Safety and Plant Academy U-M
 OCCUPATION: U-M Electrician
 EXPERIENCE/COMMUNITY SERVICE: Various professional development/certification related to profession; V-P Willow Run Community Schools Board of Education; member of Communication and Collaboration Task Force; Michigan Association of School Boards delegate
 RESIDENCE: WRCS district

Venus Strong-Smith – 7:30 p.m.

EDUCATION: BFA Theatre Design & Production, U-M; MFA Drama Theatre of the Young, EMU
 OCCUPATION: Educator/Artist
 EXPERIENCE/COMMUNITY SERVICE: Four years teaching experience; CrossTown Theatre Troupe; Ann Arbor Young Actors Guild
 RESIDENCE: WRCS district

Continued on Back

Don Garrett, Jr. – 7:50 p.m.

EDUCATION: Washtenaw Community College,

OCCUPATION: Chef Assistant

EXPERIENCE/COMMUNITY SERVICE: President WRCS Board of Education; Minister at Christ Temple Baptist Church; member of Communication and Collaboration Task Force

RESIDENCE: WRCS district

Gregory Myers – 8:20 p.m.

EDUCATION: EMU, mathematics & secondary education

OCCUPATION: Sales Manager

EXPERIENCE/COMMUNITY SERVICE: Over 11 years of retail sales and management; Willow Run Community Schools Board of Education Trustee; Past Chair of the Washtenaw County Head Start Parent Policy Council; Communication and Collaboration Task Force; member of the finance and athletic committees for WRCS; community volunteer activities through Burning Bush International Ministries

RESIDENCE: WRCS district

Mark Wilde – 8:40 p.m.

EDUCATION: Earning Computer Science degree

OCCUPATION: Supervisor, Sunset Systems & Provide.net

EXPERIENCE/COMMUNITY SERVICE: 30 years experience in technology programming; Willow Run Community Schools Board Trustee; attained Master Board Member status with MASB; mentor for Willow Run's Robotics Team 66; volunteer for the Ypsilanti Relay for Life; various WRCS fundraisers and events

RESIDENCE: WRCS district

Althea Wilson – 9:00 p.m.

EDUCATION: BA Human Development, University of Illinois

OCCUPATION: Coordinator/Educator

EXPERIENCE/COMMUNITY SERVICE: Three years experience in early childhood education; certified in community advocacy, literacy and various areas pertaining to preschool education

RESIDENCE: WRCS district



**Unified District Board Candidate Interviews – Ypsilanti High School
November 13, 2012**

Anthony VanDerworp - 6:00 p.m.

EDUCATION: Natural Resources bachelor degree, U-M; Masters in Regional Planning, U-M; Quality in Service, Philip Crosby Quality Institute; Executive Leadership, Harvard School of Government; Certified Economic Developers Training, University of South Florida

OCCUPATION: Executive Director Eastern Leaders Group, Community & Economic Development at Washtenaw County Government

EXPERIENCE/COMMUNITY SERVICE: Led several strategic and economical development processes for local and regional groups including Eastern Leaders Group, Ann Arbor Region Success Strategy and Southeast Michigan Food System Economic Partnership

RESIDENCE: YPS district

Celeste Hawkins – 6:20 p.m.

EDUCATION: BS Psychology, EMU; Masters in Social Work, EMU; School Social Work Certification, U-M; Doctoral Candidate, Educational Studies-Urban Education, EMU

OCCUPATION: Research and Teaching Assistant

EXPERIENCE/COMMUNITY SERVICE: Over 10 years of social work, advocacy and administrative experience in housing, literacy and education; Communication and Collaboration Task Force; NAAPID at Night Committee; member Estabrook PTO; Bethel AME Christian Education; volunteer Marine Corps Toys for Tots

RESIDENCE: YPS district

Dan Raglin – 6:40 p.m.

EDUCATION: Bachelor of Business Administration, EMU; School of Business, U-M; Associate Degree, WCC

OCCUPATION: Financial Services Representative

EXPERIENCE/COMMUNITY SERVICE: Over 30 years experience in the fields of finance and human resources; established the AI Townsend endowed scholarship at EMU; Chair of the College of Arts and Sciences Resource Board, EMU

RESIDENCE: YPS district

David Bates – 7:10 p.m.

EDUCATION: BS, Elementary Education, EMU; MA Educational Leadership, EMU; State of Michigan Administrative Certificate; Aspiring Administrator's Leadership Development Program

OCCUPATION: Educator

EXPERIENCE/COMMUNITY SERVICE: Over 25 years in education; President YPS Board of Education; MASB Certified Board Member; Communication and Collaboration Task Force; board member Friends of Rutherford Pool

RESIDENCE: YPS district

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Ellen Champagne – 7:30 p.m.

EDUCATION: BA International Relations, MSU, James Madison College

OCCUPATION: Evaluation and Data Systems Specialist

EXPERIENCE/COMMUNITY SERVICE: Over 10 years of research and data analysis work; YPS Board of Education Trustee; Communication and Collaboration Task Force; Co-Chair YPS Reproductive Health Education Advisory Board; Vice-Chair and Producer, Ypsilanti Youth Theatre

RESIDENCE: YPS district

Andy Fanta – 7:50 p.m.

EDUCATION: BA, JD, PhD Sociology of Education, Ohio State University

OCCUPATION: Attorney

EXPERIENCE/COMMUNITY SERVICE: Private law practice and former instructor on the collegiate level; YPS Board of Education Trustee; assisted with reincorporation of the YPS Foundation and creating a partnership between YPS and the City of Ypsilanti to examine mutually beneficial sharing of resources

RESIDENCE: YPS district

Linda Snedacar-Horne – 8:20 p.m.

EDUCATION: Detroit Business Institute, University of Detroit, American Institute of Banking

OCCUPATION: Administrative Assistant

EXPERIENCE/COMMUNITY SERVICE: Over 25 years experience in administrative support and customer service; YPS Board of Education Trustee; Chair of Instructional Quality and Finance board committees; member Palm Leaf Club, Washtenaw Alliance for Education, MASB and Michigan Department of Education HIV Review Panel

RESIDENCE: YPS district

D'Real Graham – 8:40 p.m.

EDUCATION: WCC, degrees pending in Elementary Education and Psychology

OCCUPATION: Program Coordinator, 826michigan

EXPERIENCE/COMMUNITY SERVICE: Diverse educational venues; Bird Center of Washtenaw County Wildlife Rehabilitation volunteer; Ypsilanti Parks & Recreation Commission; various leader roles at WCC including President of the African American Men for Education and Success and co-chair of the African American Student Association

RESIDENCE: YPS district

Robert Oliver – 9:00 p.m.

EDUCATION: AA degree Alpena Community College; BSLS and MA from EMU

OCCUPATION: Energy Manager

EXPERIENCE/COMMUNITY SERVICE: Over 40 years of experience working in public education; City of Ypsilanti Ethics board member; City of Ypsilanti Civil Service Commissioner; Baseball Dugout Club board member; EMU Athletic Club board member; Board member Washtenaw Area Federal Credit Union; member A2Y Chamber of Commerce; past board member for a variety of organizations including Full Circle Community Center and Huron Valley Boys and Girls Club.

RESIDENCE: YPS district