

During the Escondido board meeting on April 13th several questions arose that required further research for clarification. Below are the questions and responses related to these questions.

1.) Once a petition to unify is submitted, can it be revoked?

We believe it would be possible to revoke the petition by actions of both boards prior to action by the County Committee, however; once the County Committee has acted then it would go forward to a vote (if the waiver process is not being used). However, the boards could always initiate a subsequent action to de-unify, but that would always require County Committee action. The county committee and CDE may also be able to provide you with further information regarding this question.

2.) Organization of the new board - can it simply be a combined board of all ten current members that is restructured as each members term expires? (understanding that ultimately the entire new district will be broken into representative districts that then are filled as vacancies arise)

The Ed Code specifies the default as five members. In other words, unless the number of governing board members is prescribed in the petition, it automatically defaults to five. In most cases, governing boards are comprised of five or seven members, and in the case of very small school districts, three. Ed Code 5019 and 35012 provide for seven members, but FCMAT is not aware of a provision that provides for a larger governing board. We recommend reviewing Chapter 7 of the CDE Organization Handbook, Election of a New Governing Board, for additional information in this area. We are not aware of a governing board with more than seven so we would recommend that you check with counsel.

3.) The additional funding that is added onto the revenue limit - does it receive COLA (so the blended RL rate is calculated, then the level-up funding is calculated and a per ADA add-on is determined - are these two added together to provide one new total base RL rate per ADA which is then adjusted for COLA etc. or does the add-on amount remain a separate amount that is not adjusted?

The Revenue Limit add on receives COLA, equalization aid (if the district is still eligible after the new revenue unified revenue limit is calculated) and deficit reduction. The RL add-on becomes a component part of the new unified revenue limit. Also, since the calculations are always based on the second prior year to the effective date of the unification, any adjustments that the separate districts would have received if they had remained separate (e.g COLA, equalization aid, deficit reduction) are applied to the revenue limit in the interim year (i.e. the first prior year). Unfortunately, the same is true with the deficit factor. Page 12 of our report and Chapter 9 of the CDE Organization Handbook addresses these matters.

4.) If a tentative agreement is not reached by the newly formed collective bargaining units, what happens?

Presumably, the same protocol would be in place for any other district that cannot come to resolution: Impasse, mediation, fact finding and then the board could impose and the teachers could strike.

5.) The board is interested in hearing from districts of comparable size (if possible) regarding their experience with unification.

FCMAT recommends that the district(s) contact the CDE as they would be the best source of information. A list of district reorganizations by fiscal year is available on the CDE website through the following link: <http://www.cde.ca.gov/ds/si/ds/reorg.asp>

Larry Shirey with the CDE may be a valuable resource to you for further information regarding school district reorganizations. His contact information is lshirey@cde.ca.gov <<mailto:lshirey@cde.ca.gov>> (916) 322-1468

On behalf of FCMAT and our study team, I would like to thank the Escondido Union and the Escondido Union High School districts for their cooperation and time in assisting FCMAT during this study.

Research On District Unifications

Alhambra Unified – 18,413

Santa Barbara Unified – 15,315

Turlock Unified – 13,688

Twin Rivers Unified – 31,632

**Escondido Union School District
September 2011**

Unification Information by School District

Name: Alhambra Unified **Combined ADA:** 18,413- 18 sites **Unification date:** 2004

Unification process: Unification was a “Thompson Unification,” both Alhambra Union Elementary and High School were separate districts, chartered through the City of Alhambra – had to get city permission to put unification on ballot.

Board composition: Already had 1 single administration, with 1 school board.

Leadership/Transition: Unification was undertaken to increase revenue. No administrative layoffs due to single administration and single central office. County reorganization contact was helpful.

Human Resources considerations: Districts already had single union, single administration, one superintendent, one board. There was no need to level up salaries because they already had a common salary schedule. No layoffs due to single administration.

Educational Services considerations: None mentioned

Special Education considerations: Before unification there were 2 SPED coordinators. After unification there was 1 director and 1 coordinator. Now have 2 directors, 1 elementary, 1 secondary due to the amount of work.

Business Services considerations: None mentioned.

Current Unification Work: They have implemented centralized enrollment along with centralized language assessment (same facility). Everyone likes it – but it should not be viewed as saving money. Was done for efficiency and help to parents/staff. Since they had to hire for the centralized center, actually added staff (they didn’t view as an opportunity to reduce school staffing formula and attendance coverage). They believe that it may help recover days of ADA – fewer days missed while paperwork is being finalized.

Biggest Challenges: Legal counsel was very important and involved due to fact that both districts were city charter districts – had to have legal help to get through the election process.

Anecdotal Information: Most of changes and transition were “seamless” and major change was rehangng the sign that said Alhambra Unified School District.

Contact: Harold Standaford, Deputy Superintendent

Unification Information by School District

Name: Santa Barbara Unified

Combined ADA: 15,315

Unification date: 2011

Unification process: In 2005 the Santa Barbara School Districts became a “joint resolution district.” In January 2011, the Board of Education unanimously approved a resolution to reorganize the 2 Santa Barbara School Districts into a single unified school district. This type of reorganization, commonly referred to as a Thompson Bill Unification, enables the four elementary districts (Cold Spring, Hope, Montecito Union, and Goleta Union school districts) that feed into the Santa Barbara Secondary District to continue as independent elementary school districts with their own community identity, employees, and governing boards. The governing boards of these feeder districts approved a resolution opting out of this unification. Because of this opt-out for other feeder school districts, there was no local, county, nor state level opposition. A vote was not needed to unify or elect a new board since the board members were already serving dual capacities.

Board composition: Already had 1 single administration and 2 school boards with separate meetings. For one year, they held 3 sets of board meetings

Leadership/Transition: Had a long history of joint administration and central office. Primary reason for moving forward was the high blended revenue limit.

Human Resources considerations: The unification had no impact on current staff.

Educational Services considerations: No impact

Special Education considerations: No impact

Business Services considerations: Fewer budget reductions were needed in the 2011-12 school district budget due to the increased K-12 revenue limit.

Current Unification Work: The rebranding to the unified school district

Biggest Challenges: Communicating clearly to constituents

Anecdotal Information: New superintendent, 2011

Unification Information by School District

Name: Turlock Unified

Combined ADA: 13,688

Unification date: 2004

Unification process: Separate boards met to determine if unification should be put before the voters (elementary in support, 5-0 and high school, 3-2). Second step was to begin the county-state process (at this time the 7-member board was determined, and a number of organizational planning steps ensued). Then the unification and board election went to the ballot (2002). Two additional K-8 school districts in the community chose not to unify, but continue to feed into the high school district (2 high schools). A change in the law allowed for unification of some, but not all districts.

Unification undertaken to increase revenue limit and improve efficiencies.

Board composition: Already had 1 single administration and 2 school boards with separate meetings (1 K-8 school district with 5 members and 1 larger 9-12 school district with 5 board members). For one year, they held 3 sets of board meetings. Administrators serviced 3 sets of meetings.

The new K-12 unified school board has 7 board members (5 former elementary board members, 1 returning H.S. board member, and 1 new board member). The unified school district continued with its same administrative team as they had before unification. They had common board policies prior to unification.

Leadership/Transition: Prior to unification: 1) each of the 2 districts were the main agency for certain services and then contracted out to the "other" district; 7 bargaining units became 3 after unification: CTA, CSEA, CSAFT. Desire to unify came mostly from the elementary level.

The district's leadership culture shifted significantly, which in turn created shifts within the administration's culture (banker-board business oriented vs. a program-oriented show-and-tell board). Created challenges for H.S. system that was accustomed to operate with more independence (island-like).

Human Resources considerations: 7 bargaining groups upon unification eventually were reduced to 3 bargaining groups (over time). Formal process to determine which groups would represent the employees. The number of district employees did not change significantly...same administrative team, same amount of work. Improved HR work with just one set of bargaining units. Negotiations were "tough and long" in 2003 (just prior to unification taking effect in 2004).

Classified issues were harder to resolve. Some issues with settling on common stipends. Leveling up of salaries took place. Since they only had one district staff, there wasn't the need for classified layoffs, or two years of keeping all classified staff. Did not face the duplication in many areas that we would have. As far back as the early 80's the district's had a fixed benefit cap, depending on the employee group ranged from \$3,000 to \$5,000 per employees. Different for groups, dependent upon how they chose to allocate their available monies on to the salary schedule (higher salary vs. more toward benefits).

Educational Services considerations: There were really no changes in program with unification. Calendars had already been the same and articulation was not previously seen as an issue. The different school levels still continued to operate as needed with their own level leaders (elementary did what they needed to do...M.S. continued to...H.S. continued to...). Unification wasn't conceived of as a means for increasing student achievement.

Special Education considerations: SELPA funding essentially combined with combined costs – no hidden surprises with combining special education funding.

Business Services considerations: Improvement for Business Services, dealing collectively (instead of separately previously) with the one unified district. Fiscal year 2002-03 and 2003-04 were planning years for the unification change. Increase in revenue was about as expected (but, before large deficits were state-imposed as in recent years). Efficiency was improved-single administration, single superintendent, but two boards and staff preparing two budgets, “two of everything.” At the time of unification, were growing, and had no charter schools. Currently the district is declining in enrollment, and has made lots of budget cuts since the budget crisis (just like everyone else).

Hidden costs: Things you might not think of – Title I funding can go down because generally, high school districts have much lower participation in the school lunch program – can result in an allocation reduction in allocation. This created some additional competition between the different educational levels for fiscal resources.

Can be issues when the two districts don't have common boundaries. When boundaries are not coterminous, may complicate future bond elections by limiting (decreasing) bonding capacity.

Current Unification Work: None mentioned

Biggest Challenges: Negotiations, balancing resources

Anecdotal Information: “If I were to do this again, I would lobby to have a 5-member board. I believe a 7-member board is too many.”

“Perceived psychological benefit- Many people have a mindset that by virtue of unification that it will be easier to truly BE unified, in terms of communication, student needs, use of resources. Unification doesn't necessarily work that way. You still have the same number of opinions, factions, lobbying etc... There are just differences in how you meet the programmatic and student needs at each educational level.”

Contact: Ed Felt prior Assistant Superintendent of Educational Services
Lori Decker, Assistant Superintendent of Financial Services

Unification Information by School District

Name: Twin Rivers

Combined ADA: 31,632

Unification Date: 2004

Unification process: 60-year unification discussion, 7 different community votes over the 60 years. Three elementary school districts (K-6) and one H.S. district (7-12). Community was dissatisfied with the H.S. district and parents were making different middle school and high school choices (37% attrition rate). One elementary school district was in Program Improvement and the other 2 elementary school districts had created charter schools at the 7-8 level. Unification was determined by community vote. The unification decision and board member election were on the same ballot. Unification approved with 61% majority. At time of unification, the districts were experiencing declining enrollment, now are +100 students.

Board composition: Already had 1 single administration and 2 school boards with separate meetings. For one year, they held 3 sets of board meetings.

Leadership/Transition: For planning and early decision-making recommendations, a Joint Administrative Team was formed and funded on an ADA basis by all 4 school districts. An outside facilitator was hired. This was followed by the creation of an Implementation Plan and many task force groups.

County superintendent has a unification role (SB821), can facilitate discussion and provides important fiscal oversight during the transition process. "Period of mischief- questionable behavior by some stakeholders."

Required assistance from outside unification consultants: School Services, FCMAT, Total School Solutions, Pivot Learning, legal counsel (paid from the new blended revenue). Leadership complexities are not just at the board level. Association leadership, finding common ground. CSEA- 99 bargaining sessions in 28 months. Minimum of 5 years to get over the bumps. People remain territorial, "I am from the former ___ district."

Challenge to build a new culture when most employees still have a heavy reliance on old district procedures.

Human Resources considerations: Utilized Center for Collaborative Solutions and state level CSEA leadership for assistance with Association transitions.

Must keep classified staff for two years

- A nightmare...22 unassigned classified district level positions for 2 years
- Too many staff
- After 3 year there was finally a contract
- Laid off a lot of staff (odd, narrowly focus positions at the HS) - closed many positions – reclassified many positions and reposted.
- Had 4 separate classified contracts
 - Bumping by previous district's seniority
 - Had to refer to old contracts for grievance, etc. for the two years.
- Still struggling with classified
 - State CSEA came in and fired district CSEA president due to corruption

- Still have state CSEA rep instead of district
- 1st year had lots of district office staff-posted positions, everyone had to apply – district office staff now cut in ½. Attrition adjustment was made over time. “Difficult dance” with lots of people applying for positions and leaving throughout the first 2 years.

Because of 4 separate school districts, central office was reduced from 161 employees in Year1 to 66 employees in 2011 (after 7 years and challenging economic times).

Teachers contract was finalized by the end of Year2. Created more opportunities for teachers (teaching at different levels, coaching).

Educational Services considerations: Articulation, communication and integration are perceived to be greater, far less fragmented.

Special Education considerations: Created better SPED programs at the high school, and a more supportive community culture about the H.S. “...still nowhere near where we want to be for programs, but it is getting better.” Local SELPA helped with merging of school districts and aligning programs, services.

Business Services considerations:

State money they guaranteed did not come in as anticipated. Deficited revenue: \$15 Million was actually \$9 Million

- Leveling out of salaries took time
- Not all teachers had the same salary the first year- Contract with leveled up salaries was finalized at the end of the 2nd year
- Maintained all classified for 2 years

Multiple contract of vendors and services -4 each required consolidation into one. This was very complex and challenging work.

Discussed increased efficiencies, mentioning that Twin Rivers is the only large school district in its county with a positive budget.

Current Unification Work: Increased counselors to a 350:1 ratio at the 7-12 level with additional revenue, created student learning coach positions at each school.

Biggest Challenges: “Unification will be all consuming for several years.”

Anecdotal Information: Test scores have improved, enrollment is no longer declining, and discipline has improved. “Unification is fraught with a lot of peril.” “Unification is like building a plane, while you’re operating 2 other planes and designing new and better features for the new plane...that doesn’t exist yet.” Unification is about ½ perceived improvements and ½ actual improvements.

Contact: Janet Balcom, Director of Special Education
Frank Porter, Superintendent of Schools



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2008/2009 • Volume 1

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Note #1:
Proposed Distribution

- One set for each Board Member
- One set for each associate and assistant
- One set for each school in the District
- Other as deemed appropriate

Note #2:
Executive Summary available upon request.



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Twin Rivers Unification

School consolidation is not new, but how many times have you been able to look over a district's shoulder and watch the process unfold?

Now you can.

NSBA's National Affiliate Program and American School Board Journal are collaborating online and in print to study consolidation and its impact. The focus of this effort is the new Twin Rivers Unified School District, located on the outskirts of Sacramento, Calif.

Twin Rivers unifies three former elementary districts and a high school district into a single pre-K through 12 entity that services approximately 30,000 students. Through this project, we are examining what led to the consolidation and how the new district is dealing with various issues and challenges that merger presents. At the end, our plan is to have a useful tool that will help others that face similar circumstances.

Over the next several months, you can read regular updates about the process, hear what the individuals involved think, and meet key leaders face-to-face.

NSBA's Twin Rivers Resource Page

The National Affiliate Program's detailed look at the Twin Rivers Consolidation Project. Including interviews, community relations tools, legal documents and much much more.

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A Midyear Report on Twin Rivers Unified
There's a quote hanging in our offices: Change is a process, not an event. In the Twin Rivers Unified School District, it's a moderating theme – reminding us that unification may have started with our community vote in November 2007, but it is a process that moves forward with a thousand different choices each day.
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Rural school districts facing threat of consolidation
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