

**Report to the San Joaquin County Committee on School District Organization**

**On**

**The Preliminary Inquiry into the Organization of Tracy USD's Five Elementary Feeder Districts**

**By**

**Management, Analysis, & Planning (MAP)  
March, 2000**

**Mission**

The San Joaquin County Board of Education (acting as the San Joaquin County Committee on School District Organization) asked Management, Analysis, & Planning (MAP) to investigate the views regarding school district organization held by members of the Boards of Trustees of the five elementary school districts that feed into the Tracy Unified School District.

MAP was asked to report its findings and to outline additional investigations (if any) that the County Committee might want to undertake to assist the elementary districts in planning for their organizational futures. (See Attachment II for additional detail on the charge given to MAP.)

**Process**

MAP met with the five elementary school district Boards of Trustees between January 11 and February 7, 2000. All of the meetings were well-attended by Board members and Superintendents.

In general, MAP's presentation and the informal discussions covered the following topics (though the emphasis varied somewhat in each of the districts):

- MAP's mission as set forth by the County Committee on School District Organization.
- The legal criteria governing school district organization--see Attachment II which was included in materials sent to Board members.
- The organizational options available to the district.
- Present and future growth rates in the district.
- The bureaucratic and electoral process of school district reorganization.
- The potential interdependence among the five districts in their future organization.
- School facility requirements.

- The pros and cons of smaller versus larger high schools and the educational benefits of unification.

A summary of MAP’s meeting notes is presented in Attachment I.

**Findings and Conclusions**

**Jefferson Elementary School District**

Jefferson is experiencing substantial growth and already is close to the enrollment required of a unified district. Board members have no desire to unify with a larger district and also opposed being forced to unify with any of the other small elementary districts that feed into Tracy USD.

The Board, with the superintendent agreeing, indicated that it would be a good time to begin planning for the future of the district. The Board would welcome assistance from the San Joaquin County Committee to develop the data and conduct preliminary analyses that are necessary to identify any potential problems and lay the groundwork for self-unification.

**Banta Elementary School District**

Banta, potentially, **will experience** significant growth. The Board and the Superintendent would welcome the assistance of the San Joaquin County Committee in analyzing the growth potential and schooling implications associated with major projects development in the district. The Superintendent advised the Board that it would make good sense to get a “head start” on planning for possible self-unification.

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**Lammersville Elementary School District**

Lammersville is just beginning a ten-year period of major growth. It is believed that eleven new elementary schools will be needed in the district to serve 16,000 households in the Tri-Mark Mountain House development.

Board members agreed that they should begin to prepare plans for eventual self-unification. They asked MAP to report to the County Committee that Lammersville would like to begin studies of the details of self-unification.

**New Jerusalem Elementary School District**

New Jerusalem Board members made it clear that they want to retain “New J” as an independent elementary district. At this time, they do not want to pursue any organizational alternative other than the status quo.

**Holt Elementary School District**

Holt is an isolated district with unique geographic features that contribute to a strong sense of self-identity. The Board indicated that in the near- and middle-term it would like to maintain the organizational status quo as an independent district feeding into Tracy USD. Board members are not interested in combining with any other elementary, unified, or high school district at this time. It appears that the district will not have sufficient population for self-unification **for the foreseeable future.**

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## **Attachment I**

### **Summary of Meetings with San Joaquin County School Districts**

#### **New Jerusalem Elementary School District**

The meeting was held on Tuesday, January 11, 2000, in the New Jerusalem School library and began about 6:10 pm. Two of the three school board members, the superintendent, the charter school principal, representatives of the teachers, and several others were in attendance.

Jerry Hayward explained the mission given to Management, Analysis & Planning (MAP) by the San Joaquin County Board of Education. Hayward emphasized that the primary objective was to obtain the views of Board members and other interested parties regarding the organization of the New Jerusalem School District. Hayward outlined some options available to the district including the status quo, self-unifying, changing high school districts, and merging with the Tracy district. He pointed out that the options available to New Jerusalem would depend on action taken by other school districts (such as the possible self-unification of the adjacent Jefferson Elementary SD).

Board members made it clear that they wanted to retain the New Jerusalem School District as an independent elementary district. At this time, they said, they did not want to pursue further any organizational alternative other than the status quo. There was no disagreement with this position from any district or community member in attendance.

#### **Jefferson Elementary School District**

MAP met with the Jefferson Elementary School District Board of Trustees on January 11, 2000. All members of the Board, the superintendent, and several school district employees were present.

Hayward explained the directions given to MAP by the San Joaquin County Board and described organizational options available to the district.

The Board President, Debby Wingo, stated the following:

- The district did not want to unify with any larger district.
- The district did not want to be forced into any unions with any of the other small elementary districts that feed into the Tracy USD.

The superintendent, Ed Quinn, indicated that at some point in the future the district may want to seriously consider the possibility of self-unification. The Board President concurred with this possibility.

Hayward explained the organizational criteria that would be most important for the self-unification of Jefferson. These were: district size (1,500) and the availability of a high school. Hayward also emphasized the need to analyze the educational pros and cons of breaking away from the Tracy high school system. Hayward described the process of unification, including the usual transition period of attendance in the Tracy district, and pointed out that the State Board of Education would determine the area in which the vote of the people would occur and that in this case it would most likely be a vote within the Jefferson district only.

The superintendent point out that Jefferson was already close to the district size requirement (when you included in the count the current Jefferson students attending high school in Tracy). He also said that residential development was occurring rapidly throughout Jefferson and that enrollment was growing 10% annually.

The Board President indicated that it was not too early to begin planning for unification particularly in light of the fact that 25% of the developer fees for the homes that would contain Jefferson high school students would be going to Tracy and, by implication, that these funds could be used to help build a high school in Jefferson.

The Board President also pointed out that if Jefferson were to unify, high school students from New Jerusalem would have to go through Jefferson to get to the Tracy high school. She suggested that Jefferson might make unification contingent upon New Jerusalem agreeing to send their high school students to the new Jefferson high school.

The Board president, with the superintendent concurring, suggested that it would be a good idea if MAP continued to work with the district, under the auspices of the County Board of Education, to develop the data and conduct the analyses that would lay the groundwork for self-unification in the future and identify the major potential problems.

### **Banta Elementary School District**

MAP met with the three-member Board of Trustees of the Banta Elementary School District on Thursday, January 13, 2000. Also in attendance were the Superintendent and several district teachers.

Hayward made the presentation, emphasizing that the San Joaquin County Board of Education has no interest in imposing any type of organizational structure on the Banta ESD. Hayward pointed out that Jefferson and Lammersville may want to self-unify and if Jefferson were to do so, then Banta would want to consider whether to send its high school students to Jefferson instead of Tracy. Hayward also laid out other options, such as joining with Jefferson in single unified district.

A board member asked, What would be the motivation for Banta to join with Jefferson in a unified district? Hayward indicated that the primary reason would be to strengthen the articulation of the elementary and secondary programs.

Superintendent Draa pointed out that Banta may grow very rapidly in the coming years and that if this were to happen, Banta should consider self-unification. Draa described the Califa project which is to include more than 1 million square feet of commercial development plus residential development. Draa argued that Banta should get a “head start” on planning for possible self-unification.

The Board agreed with Draa that the district should begin to analyze the development and enrollment growth picture and asked that MAP, under the auspices of the San Joaquin County Board of Education, conduct some investigations along this line. Superintendent Draa recommended that MAP work with Califa and that he would give MAP the names of appropriate contacts.

### **Lammersville Elementary School District**

MAP met with the Board of Trustees of the Lammersville Elementary School District at 6:30 pm on January 19, 2000, at the Lammersville School. All five members of the Board were in attendance (one member arrived about half way through the meeting), along with the Superintendent (William Lebo), the director of school facilities, an assistant principal, and several community members.

Hayward described the previous meetings we have had with New Jerusalem, Banta, and Jefferson and outlined their preferences with respect to district organization.

Hayward outlined the self-unification process and described each of the nine criteria that are applied in reorganization decisions. Hayward indicated that since Tracy USD supports unification of the outlying feeder schools, and since the unification of Lammersville would not have a material impact on Tracy, the vote on such unification would most likely take place only within Lammersville ESD.

There was discussion about the various development projects occurring in the district, including three future developments on the east side of the district and the major Mountain House project sponsored by Tri-Mark which will begin infrastructure construction in about May. The Mountain House development, which is entirely within the school district, may eventually have as many as 16,000 households.

Board members described a contract that Tracy USD has with Tri-Mark for the construction of a high school. It was suggested that this contract could be transferred to Lammersville in the event of self-unification. Tri-Mark supports the self-unification of Lammersville, according to Board members.

Lammersville ESD and Tri-Mark are negotiating a contract concerning the construction of 11 new elementary schools. It was mentioned that Tri-Mark wants this contract to restrict attendance at the new Mountain House schools to residents of the development. The legality of such a provision was questioned by Board members and other attendees at the meeting.

There was a lengthy discussion about the proposal of the Tracy USD to create a charter school cluster (the Tracy Learning Center) serving pupils in grades kindergarten through 12 on land within the Lammersville district. Board members expressed concern that the charter school might draw students away from Lammersville ESD schools. Superintendent Lebo indicated that the only certain way to prevent Tracy from establishing the charter school cluster would be to self-unify, thereby making it legally impossible for Tracy to establish the schools.

Board members agreed that they should begin to prepare plans for eventual unification. The value of having their own high school was emphasized, particularly the educational and community facilities advantages. One member said that he had been reluctant to move toward unification at this time because the district already had “enough on its plate” with the need to build new elementary schools. But he supported further study of unification at this time.

It was agreed that MAP would report back to the County Board that Lammersville would like to begin studies of the detail of unification.

### **Holt Elementary School District**

MAP met with the five-member Board of Trustees of the Holt Elementary School District at 7:00 pm, Monday, February 7, 2000. Also in attendance was the district Superintendent, Diane Sorensen.

Bill Furry made the presentation for MAP, outlining the instructions given to MAP by the San Joaquin County Board of Education, and laying out various options for the organization of Holt which the Board might want to consider.

Discussion centered on the isolation of Holt, on the green-belt restrictions that limited the future population growth of the district, and on the importance of maintaining an elementary school in the district, both for the purposes of elementary education and as a community center.

The Holt Board indicated that in the near- and middle-term it would like to maintain the organizational status quo in Holt as an independent elementary district feeding into the Tracy USD for high school education. The Board members have no interest in combining with any other elementary, unified, or high school district at this time.

**Attachment II**

**Document Sent To the Superintendents of the Five Elementary School Districts For Inclusion in the Meeting Materials Sent to Members of the Board of Trustees**

**The Charge to Management, Analysis, & Planning (MAP) From the San Joaquin County Board of Education**

The San Joaquin County Board of Education (acting as the San Joaquin County Committee on School District Organization) has asked MAP to do the following:

- Meet with the Boards of Trustees of all of the elementary school districts that feed into the Tracy Unified School District to ascertain the views held by members of those boards and by the community at large concerning school district reorganization.
- Engage in an open discussion with the board members and the community about the options for school district organization--both short- and long-term--the legal criteria that govern school district organization, and other relevant state statutes.
- Report back to the County Board of Education on the findings of the meetings with the five elementary school districts.

The San Joaquin County Board of Education has emphasized to MAP that it does not assume any need for organizational change, has no desire to impose any reorganization upon the elementary districts, and that it will support the districts' desires.

- The status quo may be the most appropriate organizational option for any particular district.

**Legal Criteria Governing Reorganization Proposals (Education Code Section 35753)**

The State Board of Education may approve a proposal for school district reorganization if all of the following conditions are substantially met:

1. The new districts will be adequate in terms of the number of pupils enrolled. Each district must have at least the following projected enrollment on the date the reorganization proposal becomes effective:

Elementary district.....	901
High school district.....	301
Unified district.....	1,501



In addition, an analysis must be undertaken of whether the projected enrollment will increase or decline.

2. The districts are each organized on the basis of a substantial community of interest. No single factor is likely to determine that community identity exists. Several attributes of the population and territory must be examined in order to make a judgment regarding community identity. Indicators include homogenous or consistent housing developments, the usage pattern of parks and school facilities, traffic patterns and public transportation systems, geopolitical factors such as topography and city council or county supervisor districts, and neighborhood and regional shopping patterns.
3. The proposal will result in an equitable division of property and facilities of the original district or districts. "Property" includes cash on hand and funds due but uncollected on the date of reorganization, including prior-year state apportionments based on average daily attendance. Reorganization plans must include a thorough analysis of present and future facilities, including studies of assessed valuation in each proposed district, current and proposed zoning, projected residential, commercial and industrial development, current and projected student enrollment, the utilization, capacity, and condition of existing school facilities, and a "comparison analysis" considering both existing and proposed divisions.
4. The reorganization of the districts will not promote racial or ethnic discrimination or segregation. To determine whether the new districts would promote racial or ethnic discrimination or segregation, the State board of Education examines the number and percentage of each ethnicity in the existing districts and schools, and the number and percentage of each ethnicity in proposed districts and schools. Also examined are projections of ethnic populations into the future, existing policies and programs--whether voluntary or court-ordered--designed to alleviate ethnic segregation, and conditions such as safety hazards and geographic features that may promote segregation or have an impact on the feasibility of integration of the affected schools.
5. The proposed reorganization will not result in any substantial increase in costs to the state. Potential areas of cost increase to the state include "basic" aid, grants for school facilities, funding for categorical programs, allocations for transportation, and necessary small school allowances.
6. The proposed reorganization will not significantly disrupt the educational programs in the districts affected by the proposed reorganization, and will continue to promote sound educational performance in those districts. In assessing the impact of a proposed reorganization on educational programs and student achievement, the State Board of Education will examine program quality reviews conducted by the California Department of Education, private

accreditation reviews, school accountability report cards, the results of standardized tests administered by the state, dropout rates, and other performance data. The capacity of the proposed districts and schools to offer the educational opportunities available to students in the existing districts and schools must be addressed.

7. The proposed reorganization will not result in a significant increase in school housing costs. The adequacy of school facilities in all proposed districts must be assessed, including the capability of serving pupils at all elementary and secondary grade levels. Consideration must be given to current and projected enrollments, existing facilities, local bonding capacity, developer fee income, land already owned, eligibility for state school construction and modernization aid, and deferred maintenance needs.
8. The proposed reorganization is not primarily designed to result in significant increase in property values. The rationale for a transfer of territory should be analyzed with this criterion in mind, and if the rationale is not compelling for other reasons, then consideration must be given to whether increased property values might be the primary reason for the proposed reorganization.
9. The proposed reorganization will not cause a substantial negative effect on the fiscal management or fiscal status of the proposed district or any existing district affected by the proposed reorganization. The review must address current and succeeding fiscal years in districts affected by the proposed reorganization, including analysis of gains or losses of revenue from such sources as community redevelopment agency agreements or other pass-through agreements, incremental taxes, Mello-Roos Community Facility District funds, parcel taxes, certificates of participation, basic aid, tax overrides, mitigation agreements with developers, and any other categorical or specialized funds.