

DDESS Transfer Study

Recommendations Report:

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DDESS Transfer Study – Phase 2 Summary Report and Recommendations

I. Introduction

The University of Massachusetts Donahue Institute (UMDI) has conducted an objective and impartial evaluation of the feasibility of transferring 58 Domestic Dependent Elementary and Secondary Schools (DDESS) operated by the Department of Defense Education Activity (DoDEA). This report summarizes Phase 2 of this process, which included the development of a comprehensive range of school transfer alternatives and the collection and review of data, analytical components, methodology and other information to evaluate those alternatives. The results of the Phase 2 research were then presented to a panel of three national education experts who systematically examined the data and established a set of criteria for their recommendations for each DDESS school. On October 10, 2003, the national expert panel provided DoDEA Director Joseph Tafoya and Deputy Assistant Secretary of Defense John Molino with its transfer recommendations. Those recommendations are summarized in the final section of this document.

The Phase 2 research process incorporated the results of the first phase of this study, for which the architectural and engineering firm of Parkhill, Smith & Cooper Inc. conducted a survey (hereafter referred to as the Parkhill Study) of recurring and non-recurring facilities costs of DDESS schools on the 14 military installations involved. The results of the Parkhill study were incorporated into the Phase 2 study's overall analysis of the costs and benefits of each transfer alternative that was used by the national experts in making their recommendations. Also contained within this report are the guiding principles, criteria and rationale developed and used by the experts in their analysis.

Greater detail and background about the Phase 2 process and findings are available in the reports and appendices that accompany this Summary Report.

It is important to stress that the University of Massachusetts' role in Phase 2 was that of an objective, third party to develop and present systematic, thorough and objective data collection and cost benefit analysis to assist the national experts. The recommendations made by the experts are based solely on the analysis prepared as part of the first two phases of the study. Neither the experts nor the University were charged with considering quality of life and other external factors, which DoDEA is now analyzing as Phase 3 of the school transfer review.

II. Phase 2 process and methodology

Phase 2 included an objective and impartial evaluation of the estimated associated costs that will be borne by the federal government for transferring students, facilities and operations to local control. Included in the study process were site visits and interviews with DDESS and local education agency (LEA) officials, an examination of school enrollment, performance and services information and a review of various data sources, including the Parkhill study, federal impact aid payments, and LEA financial reports.

This information was used to evaluate financial and non-financial costs and benefits of a comprehensive set of transfer alternatives for each of the 58 DDESS schools, all of which are located within the continental United States.

A. School transfer alternatives

The following transfer alternatives were considered:

- ***Status quo:*** DDESS schools continue to operate as they have in the past, with DoDEA retaining responsibility for maintaining current standards of education at the base schools;
- ***Transfer with facilities:*** DDESS students and the school facilities are transferred to the LEA and integrated into the school district. The LEA -- and not DODEA -- accepts full responsibility for educating military children and for the future upkeep of the school facilities;
- ***Transfer with use of facilities:*** The expert panel developed this variation of the Transfer with Facilities alternative in response to legal restrictions in some states that prohibit LEAs from taking possession of facilities located on federal lands. Under this alternative, DDESS students continue to be educated in the DDESS facilities. However, the LEA -- and not DODEA -- accepts full responsibility for educating military children. The LEA manages and controls the use of the facility for education of LEA students, including former DDESS students. Ownership and maintenance of facilities remains the responsibility of DoD;
- ***Transfer without facilities:*** DDESS students are transferred to the neighboring LEA and integrated into the existing school facilities. The LEA accepts full responsibility for educating military children. The LEA remains eligible for state and federal aid as in the past;
- ***Contract with the LEA to provide educational services on the installation:*** Under this alternative, DoDEA negotiates contractual agreements with the LEA to administer the daily operation of the DDESS schools;
- ***Create a public school district within the installation, coterminous with its existing boundaries:*** Also known as the coterminous alternative, this alternative creates a new, state-recognized public school district within the geographical boundaries of the military base. DoDEA shifts its financial and oversight responsibilities to the newly created LEA, completely eliminating its educational obligations.

B. Universal rules for feasibility:

A limited set of universal rules was developed to achieve two goals. The first was to assure basic equity and fairness for the students, families and communities that might be affected by the outcomes of particular transfer alternatives; the second was to assure that the panel of national experts was presented with a package of findings and analysis that was sufficiently informative for them to be able to produce their recommendations. Without any universal rules, for example, the UMDI study team calculated nearly 500,000 possible alternative arrangements for the 58 schools. Therefore, in order for the expert panel to apply uniform criteria in an efficient and equitable manner, it was necessary to delineate the alternatives through application of several rules, i.e., principles. Application of the following rules to all installations was necessary to meet the dual criteria of equity and efficiency:

- It would be unfair for some students at the same grade level to transfer to the LEA district while other students in the same grade remain on base. **Therefore, at any installation, any decision affecting one DDESS school shall apply to all DDESS schools with the same or overlapping grade levels;**
- To maintain continuity and effectiveness of education, it would not be feasible to transfer students at a particular grade and then return them to the DDESS curriculum at a higher grade. **Therefore, if a transfer is made at one grade, all succeeding higher grades must transfer as well;**

- If a DDESS elementary school with a Pre-K program is transferred to an LEA that does not offer a pre-K program, **DDESS will continue to offer pre-K services, using either on-site or off-site resources;**
- It would be both inefficient and detrimental to educational consistency to have some DDESS schools run under contract with the LEA while others on the same installation do not. **Therefore, if a contract or coterminous alternative is chosen for any DDESS school, that alternative shall apply to all schools on the installation.**

C. Analytical Components

In order to develop a comprehensive determination of the operational, facilities and other costs associated with each transfer alternative, the Phase 2 analysis was organized into the following analytical study components:

- **Feasibility:** This component focused on logistical and other factors that could limit the viability of transfer alternatives, including student transportation, security issues, school capacities, enrollment trends, and local legal factors that may eliminate certain alternatives;
- **Financial factors:** A comprehensive analysis of major categories of costs and major sources of funding was conducted for each school at each installation:
 1. Cost analysis: This sub-component incorporated the study of several major categories of data, including recurring operational costs, non-recurring facilities costs, one-time costs associated with transfer, expenditure trends, staffing ratio policies, and enrollment projections;
 2. Revenue analysis: This sub-component reviewed each LEA's major funding sources: local taxes, state grants, federal grants pursuant to their respective state and federal programs.
- **Programs and services:** Phase 2 compared DDESS and LEA operations in order to determine whether the programs and services were available and comparable. Programs reviewed included Special Education, ESOL, Gifted and Talented and Pre-kindergarten instruction;
- **Performance and quality:** This study component compared DDESS and LEA schools on available indicators of school performance and quality. The quality component of the analysis considered various factors, including class size standards, teacher qualifications and pupil-teacher ratios. School performance was measured as student performance for the State on nationally normed tests and for the district using either criterion referenced or nationally normed tests. (Variations in testing methods are explained in the appropriate installation chapters in the white-covered volume entitled, "DDESS Transfer Study Report -- Book One (Narratives)."

D. Methodology

For conduct of Phase 2, the UMDI study team relied on the premise that the research should build upon, rather than reinvent, existing data sources. In order to establish a comprehensive data and research foundation, the study team:

- Undertook a systematic review of relevant previous studies;
- Systematically reviewed both historical and current financial documents and demographic data pertaining to DDESS schools and their LEA counterparts;

- Based partially on prior federal impact aid and state aid payments, developed comprehensive estimates of the additional federal impact aid and state aid each LEA could expect in the event of transfer; and
- Designed a sensitivity analysis to test vital assumptions and illustrate their effects on the alternatives.

In addition to collecting and preparing a comprehensive database, research teams conducted on-site in-depth interviews in order to assess LEA concerns and willingness to accept transferred students. The executive and fiscal leadership of the LEAs were queried especially regarding the unique service needs of the DDESS students. This analytical and financial information was compiled into two separate volumes presented to the panel of experts.

The first volume, **Book One Narratives**, presented an overview of Phase 2, along with more detailed information and a guide to utilize the data and other study materials. Book One includes individual chapter narratives concerning each installation.

Book Two – Report Data consists of five volumes (all with blue covers, one for each DDESS district). Data presented includes:

- Present Value 04 by installation with sources indicated (an estimate of the net present value of school level expenditures between FY04 and FY07 for each alternative);
- Installation Status Quo Report (DDESS / LEA key data);
- Alternatives Summary Grid (a summary of analytical components presented for each transfer alternative);
- Individual profiles of all DDESS schools and those LEA schools visited by the study team.

E. Role of the panel of experts

Results of the data and study component analysis were presented to a panel of three leading national experts in educational administration and finance. The experts are:

- **Kern Alexander, Ed.D.** Dr. Alexander is a national expert in the field of school finance. He is Chair of the Board of Editors for the Journal of Education Finance. He served as Director of the Institute for Educational Finance at the University of Florida, and as Director of the National Educational Finance Project while it conducted a nationwide study of educational fiscal policy involving all 50 state education agencies. He has published numerous books, book chapters and articles on school finance. He is currently a professor at the University of Illinois at Urbana-Champaign;
- **Richard Salmon, Ed.D.** Dr. Salmon is a nationally recognized expert in the fields of school finance and Federal Impact Aid issues. He is a professor at Virginia Tech and has authored numerous textbooks, book chapters, and articles on public school finance. Dr. Salmon is a member of the Board of Editors for The Journal of Education Finance. He also consults for the U.S. Department of Education, Bureau of Impact Aid and has testified for the Department in several federal trials. He served in the United States Navy for more than 20 years, retiring as Commander from the Naval Reserve; and
- **Deborah A. Verstegen, Ph.D.** Dr. Verstegen is a national expert in the field of school finance. She is a professor of education at the University of Virginia, where she teaches a number of courses including Educational Finance Policy and Practice, School Finance, and Educational Policy Analysis. She has authored many books, book chapters, refereed journal

articles, and monographs on education finance. She is past editor and currently serves on the editorial staff of *The Journal of Education Finance*. She has completed a study of all 50-State school finance systems for the Education Commission of the States, entitled “School Finance at a Glance.”

Using the cost benefit analysis and other data collected by the study team, the three national experts met for a week in October with the UMDI study team to evaluate the data and findings of the Phase 1 and Phase 2 research. During this week-long work session, the experts deliberated extensively and produced their school-by-school recommendations of what they deemed to be the most cost-beneficial transfer alternatives. The expert panel systematically considered both the financial and non-financial information in evaluating each feasible alternative.

To guide their recommendations, the panel established the following guiding principles:

1. **All students transferred from DDESS to local public schools must be provided comparable educational programs, services and facilities.** (This means that while individual programs and services in the LEA may not be identical in every respect to those of the DDESS, there must be substantial overall comparability between the DDESS and LEA.);
2. **School communities gain from diversity.** (LEA and DDESS students can mutually benefit by being placed together in common schools, as long as the quality of those schools is comparable.);
3. **Cost effectiveness of government.** (Any transfer alternative must be cost-effective not only to DoDEA, but to the state and local entities involved.);
4. **Deference to the needs of younger students.** (It is rarely advisable to transfer or otherwise disrupt the educational process of very young students.);
5. **Any transfer of DDESS will include just and reasonable compensation to the LEA for operational and facilities costs; and**
6. **Each installation/LEA will be considered separately.**

In addition to these guiding principles, the expert panel established certain criteria for their recommendations. These criteria included the LEA’s willingness to accept DDESS students, as well as the necessary financial and physical capacity to serve DDESS students. *The experts stressed that while each one was important, no single principle or criterion would necessarily rule in or rule out a transfer alternative. Rather, the totality of all financial and non-financial factors were carefully considered, evaluated, and factored into each recommendation.*

The next section of this summary document presents the experts’ recommendations for each installation, coupled with a summary of their rationale for the recommendations. Page number citations to “white book” or “blue book” refer to financial and non-financial information that was used by the experts in making their recommendations.

III. School transfer recommendations

A. Georgia/Alabama DDESS District Installation: Fort Benning

Schools:

- Loyd Elementary School (PK-5)
- McBride Elementary School (PK-3)
- Stowers Elementary School (PK-5)
- White Elementary School (PK-5)
- Wilson Elementary School (PK-5)
- Faith Middle School (6-8)
- Dexter Elementary School (PK-5)

**LEAs: Muscogee County, GA
Chattahoochee County, GA**

Recommendation: All schools transfer with use of facilities to Chattahoochee County.

Notes:

- **Special arrangements will be needed to enable Loyd and McBride students who live in Muscogee County to attend Chattahoochee County schools;**
- **DoD remains responsible for building maintenance, operations and improvement.**
- **DoD may need to offer PK as Georgia has a lottery system for PK programs**

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts' comments:

While installation officials did express concerns about the quality of Chattahoochee County schools, the transferred DDESS students would represent the vast majority of student enrollment within the LEA (about 3000 of the LEA's total post-transfer enrollment of 3400 would be federally-connected students). In essence, the Chattahoochee County schools would immediately take on the social, demographic and, to a large extent, the performance profile of the DDESS schools. Further, it is expected that DDESS students would continue to be educated on the installation and, given the immediate need for additional teachers in the Chattahoochee County schools that the recommended transfer would create, it is expected that many of the DDESS teachers would be given an opportunity to continue to teach DDESS students (although staffing decisions would be made at the discretion of the LEA and compensation levels and work rules of the LEA would apply). The pupil-teacher ratios and the per pupil¹ expenditures of the DDESS and Chattahoochee County are already comparable. Additionally, the LEA superintendent expressed interest in receiving Fort Benning students. Georgia's fiscal position offers further support for this recommendation.

See White Book pages 1.1 – 1.8 and Blue Book pages 1.1 – 1.9.4

¹ Per Pupil Expenditure—This includes instructional spending, but excludes central office, and start up costs for transfer options including furniture

Installation: Fort Rucker

Schools:

- Fort Rucker Primary School (PK-1)
- Fort Rucker Elementary School (2-6)

LEAs:

Daleville City, AL
Ozark City, AL
Enterprise City, AL

Recommendation: Status Quo for all schools

Guiding principles cited:

- Programs are not comparable
- State and local fiscal capacity
- Needs of younger students

Summary of experts' comments:

Because of poor performance outcomes and serious concerns about Alabama's fiscal support of education, which is among the lowest in the nation, any transfer of these schools could jeopardize current levels of educational quality for DDESS students at Fort Rucker.

See White Book pages 2.1 – 2.8 and Blue Book pages 2.1 – 2.13.3

Installation: Maxwell Air Force Base

Schools:

- Maxwell Elementary School (PK-6)

LEA: Montgomery County, AL

Recommendation: Status Quo

Guiding principles cited:

- Programs are not comparable
- State and local fiscal capacity
- Needs of younger students

Summary of experts' comments:

Because of poor performance outcomes and serious concerns about Alabama's fiscal support of education, which is among the worst in the nation, any transfer of these schools could jeopardize current levels of educational quality for DDESS students at Maxwell AFB.

See White Book pages 3.1 – 3.5 and Blue Book pages 3.1 – 3.5.4

Installation: Robins Air Force Base

Schools:

- Robins Elementary School (K-6)

LEA: Houston County, GA

Recommendation: Transfer with use of facilities

Note: DoD remains responsible for building maintenance, operations and improvement.

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)
- Precedent of transfer of Linwood Elementary School to Houston County

Summary of experts' comments:

The LEA's pupil teacher ratio is positive compared to that of the DDESS, and performance measures are comparable. The previous transfer of a DDESS elementary school (Linwood Elementary School) to the LEA was also a determining factor in this recommendation.

See White Book pages 4.1 – 4.6 and Blue Book pages 4.1 – 4.5.4

B. Kentucky DDESS District

Installation: Fort Campbell

Schools:

- Barkley Elementary School (PK-5)
- Jackson Elementary School (PK-5)
- Lincoln Elementary School (PK-5)
- Lucas Elementary School (PK-5)
- Marshall Elementary School (PK-5)
- Wassom Middle School (6-8)
- Mahaffey Middle School (6-8)
- Fort Campbell High School (9-12)

**LEAs: Clarksville-Montgomery, TN
Christian County, KY**

***Recommendation: Transfer all K-12 students with use of facilities to
Christian County, KY***

Notes:

- **DoD remains responsible for building maintenance, operations and improvement;**
- **DoD will provide funds as needed for students residing in Tennessee to be educated by Kentucky. Arrangements will be needed between Tennessee and Kentucky**
- **DoD maintains PK program.**

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts' comments:

This is the only installation that involves two LEAs and two states. A transfer of the DDESS students is feasible only if the two states can negotiate acceptable financial arrangements that would assure the continuation of educational services comparable to those provided by DDESS. Arrangements also will be needed with Kentucky for tuition payments for Ft. Campbell students who are residents of Tennessee. Considering all factors, Christian County, Kentucky has higher quality measures than Clarksville-Montgomery County, Tennessee, which in any case could not logistically serve transferred students as well as Christian County. Christian County, in turn, could not accept the DDESS students without continued use of the base facilities.

See White Book pages 5.1 – 5.6 and Blue Book pages 5.1 – 5.9.2

Installation: Fort Knox

Schools:

- Kingsolver Elementary School (PK-3)
- Mudge Elementary School (PK-3)
- Pierce Elementary School (PK-3)
- Van Voorhis Elementary School (PK-3)
- Walker Elementary School (4-6)
- MacDonald Elementary School (4-6)
- Scott Middle School (7-8)
- Fort Knox High School (9-12)

**LEAs: Hardin County, KY
Meade County, KY**

***Recommendation:* Transfer with use of facilities (as needed) to Hardin County.**

Notes:

- **DoD remains responsible for building maintenance, operation and improvement;**
- **Special arrangements needed for students who live in Meade County to attend Hardin County schools;**
- **DoD maintains PK program.**

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts' comments:

The level of educational quality indicators for the two LEAs is generally comparable, although Hardin County's per pupil² expenditure exceeds that of Meade County by \$500 in the instructional section of the budget. Hardin County is larger and more capable than Meade County to absorb DDESS students, and the executive leadership of Hardin County appeared more receptive to a transfer of DDESS students. While Hardin County does have district-wide capacity, due to the mismatch of students and available student slots, it will likely need at least some of the DDESS facilities, which is why the recommendation calls for transfer with use of facilities *as needed*.

See White Book pages 6.1 – 6.8 and Blue Book pages 6.1 – 6.9.4

² Per Pupil Expenditure—This includes instructional spending, but excludes central office, and start up costs for transfer options including furniture.

C. North Carolina DDESS District

Installation: Camp Lejeune

Schools:

- Berkeley Manor Elementary School (PK-5)
- Delalio Elementary School (PK-5)
- Russell Elementary School (PK-5)
- Stone Street Elementary School (PK-5)
- Tarawa Terrace 1 Elementary School (PK-1)
- Tarawa Terrace 2 Elementary School (K-5)
- Brewster Middle School (6-8)
- Camp Lejeune High School (9-12)

LEA: Onslow County, NC

Recommendation: Transfer all schools with use of facilities

Notes:

- **DoD remains responsible for building maintenance, operations and improvement;**
- **Principle regarding reasonable compensation must include compensation adequate to serve special education students above the state-funded limit and to retain comparable level of special needs services;**
- **DoD maintains PK program.**

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts' comments:

One installation school (Stone Street) is on DoDEA's repair list, though the work is not funded. Another school (Tarawa Terrace 1) is in poor condition. While the recommendation to transfer all schools with use of facilities is consistent with the guiding principles, a situation unique to North Carolina requires this recommendation to include the statement regarding compensation for adequate special education services. North Carolina places a state funding cap on special education costs that limits participation to 12.5%. This installation currently has a high quality special education program serving a significant special education population. Military personnel who have dependents eligible for special education services often seek assignments located near special education programs and facilities. In some instances, those special education programs and facilities are provided by LEAs. In other instances, such as Camp Lejeune, the special education programs and facilities are provided by DDESS. Under this recommendation, DoDEA will have to compensate the LEA fully for any extra costs (beyond the 12.5 percent cap) due to the extraordinary high percent of special education children receiving services through DDESS.

See White Book pages 7.1 – 7.6 and Blue Book pages 7.1 – 7.5.9*

***Important note: White Book narrative (page 7.4) states that Onslow County offers pre-K programs to regular education students. This only applies to regular education students who are eligible for grant funded Head Start or Title 1 programs.**

Installation: Fort Bragg

Schools:

- Bowley Elementary School (PK-4)
- Butner Elementary School (PK-4)
- Devers Elementary School (PK-4)
- Holbrook Elementary School (PK-4)
- McNair Elementary School (PK-4)
- Murray Elementary School (PK-4)
- Pope Elementary School (PK-4)
- Irwin Middle School (5-6)
- Albritton Junior High School (7-9)

LEA: Cumberland County, NC

Recommendation: Transfer all schools with use of facilities

Notes:

- **DoD remains responsible for building maintenance, operation and improvement;**
- **Principle regarding reasonable compensation must include compensation adequate to serve special needs students above the state-funded limit and to retain comparable level of special needs services;**
- **DoD maintains PK program.**

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts' comments:

One installation school (Irwin) is on DoDEA's replacement list, and two others are in poor condition. While the recommendation to transfer all schools with use of facilities is consistent with the guiding principles, a situation unique to North Carolina requires the additional recommendation regarding compensation for adequate special education services. North Carolina places a state funding cap on special education costs that limits participation to 12.5%. Military personnel who have dependents eligible for special education services often seek assignments located near special education programs and facilities. In some instances, those special education programs and facilities are provided by LEAs. In other instances, such as Fort Bragg, the special education programs and facilities are provided by DDESS. Under this recommendation, DoDEA will have to compensate the LEA fully for any extra costs (beyond the 12.5 percent cap) due to the extraordinary high percent of special education children receiving services through DDESS.

See White Book pages 8.1 – 8.7 and Blue Book pages 8.1 – 8.5.5.

D. South Carolina/Fort Stewart DDESS District**Installation: Ft. Jackson****Schools:**

- Hood Street Elementary School (2-3)
- Pierce Terrace Elementary School (PK-1)
- Pinckney Elementary School (PK, 4-6)

LEA: Richland County 2, SC***Recommendation: Status Quo for all schools*****Guiding principles cited:**

- Programs are not comparable
- Capacity issues
- State and local fiscal conditions
- Needs of younger students

Summary of experts' comments:

Richland County's schools are already over capacity, and the LEA has little physical room to expand its facilities. The fiscal condition of South Carolina, which has cut education funding five times over the past two fiscal years, raises questions about the LEA's ability to successfully absorb the DDESS students from Ft. Jackson. In addition to these factors, a transfer to the LEA could jeopardize the quality of education now received by students at Fort Jackson, who, as mostly younger students, would face substantial disruption of educational services in the event of a transfer.

See White Book pages 9.1 – 9.5 and Blue Book pages 9.1 – 9.5.4

Installation: Ft. Stewart

Schools:

- Brittin Elementary School (K-6)
- Diamond Elementary School (PK-6)

LEA: Liberty County, GA

Recommendation: Transfer with use of facilities for both schools

Notes:

- **DoD remains responsible for building maintenance, operations and improvement.**
- **DoD may need to offer PK as Georgia has a lottery system for PK programs**

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts' comments:

Educational programs and quality indicators, as well as educational expenditures are relatively similar for the installation and the LEA. It appears that Georgia has been more generous in education funding than most other states in the southeastern region of the nation. Also, younger students would not face long, disruptive bus trips under this recommendation since they will remain in their current schools.

See White Book pages 10.1 – 10.5 and Blue Book pages 10.1 – 10.5.4

Installation: Laurel Bay

Schools:

- Laurel Bay Elementary School (PK-2)
- Laurel Bay Intermediate School (3-6)

LEA: Beaufort County, SC

Recommendations: Transfer grades 4-6 with one facility (see below)

- **Move grade 4-6 students from the intermediate school facility to the elementary school facility and transfer Laurel Bay Elementary School facility with grades 4 – 6 to LEA (the installation’s perimeter is changed so that the elementary school facility lies within the LEA district);**
- **Laurel Bay PK-3 students remain Status Quo, but are housed in the intermediate school facility.**

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts’ comments:

The recommendation to transfer Grade 3 students to the intermediate school and to retain the PK-3 students on the installation reflects deference to the needs of younger children. While initially moving to the current intermediate school facility, these students may move eventually to a new school facility currently planned for the installation. Laurel Bay is the only installation with a school – the elementary school – in such close proximity to the LEA border that a transfer of the physical facility is practical.

See White Book pages 11.1 – 11.6 and Blue Book pages 11.1 – 11.5.3

E. Virginia/New York DDESS District**Installation: Dahlgren****Schools:**

- Dahlgren Dependent School (PK-8)

LEA: King George County, VA***Recommendation: Status Quo*****Guiding principles cited:**

- Programs are not comparable
- State and local fiscal capacity
- Needs of younger students

Summary of experts' comments:

This recommendation reflects deference to the interest of younger students. The Dahlgren Dependent School is a small, early childhood neighborhood school with a small enrollment. A transfer into the much larger LEA would likely jeopardize educational quality for its young students. Per pupil³ expenditures are about half of DDESS. There is no capacity.

See White Book pages 12.1 – 12.5 and Blue Book pages 12.1 – 12.5.3

³ Per Pupil Expenditure—This includes instructional spending, but excludes central office, and start up costs for transfer options including furniture.

Installation: Quantico

Schools:

- Ashurst Elementary School (K-3)
- Russell Elementary School (PK-3)
- Burrows Elementary School (PK, 4-5)
- Quantico Middle/High School (6-12)

LEA: Prince William County, VA

Recommendations:

- **Ashurst Elementary School and Russell Elementary School: Status Quo**
- **Burrows Elementary School (grades 4-5 only) and Quantico Middle/High School: Transfer without facilities**

Note: Based on the findings of the Phase 1 study, DoDEA will have to resolve physical problems with Russell Elementary School.

Guiding principles cited (Ashurst and Russell, Status Quo):

- Programs are not comparable
- Needs of younger students

Guiding principles cited (Burrows and Quantico, Transfer without facilities):

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts' comments:

The recommendation to transfer without facilities reflects, in part, the LEA's unwillingness to accept any of the base facilities. The recommendation to transfer only grades 4 to 5 Burrows students – not PK – reflects deference to needs of younger students. As described in the Parkhill study, DoDEA needs to replace Russells. Burrows, however, is a good facility, creating the possibility that DoDEA could move former Ashurst and Russell students to Burrows after students from Burrows and Quantico M/High School students are transferred to the LEA. Also, it should be noted that Prince William County students in higher grades outperformed socioeconomic expectations on standardized tests, while students in the lower grades underperformed. Prince William County offers a more comprehensive selection of school programs for middle and high school students, including extensive career/vocational programs.

See White Book pages 13.1 – 13.7 and Blue Book pages 13.1 – 13.5.5

Installation: West Point

Schools:

- West Point Elementary School (PK-4)
- West Point Middle School (5-8)

LEA: Highland Falls, NY

Recommendations:

- **West Point Elementary School: Transfer with use of facilities**
- **West Point Middle School: Transfer without facilities**

Notes:

- **DoD remains responsible for building maintenance, operation and improvement;**
- **DoD maintains PK program.**

Guiding principles cited:

- Addresses all guiding principles subject to appropriate agreements with the LEA(s)

Summary of experts' comments:

This recommendation requires that younger children (PK to 4) will remain in their current schools on the installation, while older students are transferred. In this case, the LEA to which they will transfer had a higher per pupil⁴ expenditure and a lower pupil teacher ratio than DDESS, both of which are quality indicators. The recommendation for transfer of the West Point Middle School is in part due to the fact that the facility needs to be replaced immediately.

See White Book pages 14.1 – 14.6 and Blue Book pages 14.1 – 14.5.3

⁴ Per Pupil Expenditure—This includes instructional spending, but excludes central office, and start up costs for transfer options including furniture.

**University of Massachusetts Donahue Institute
Economic and Public Policy Research**

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