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Organized Anarchies in the Marketplace: Competition and Change in a Rural School District

A Dissertation Presented

by

LAURA C. DAVIS

Submitted to the Graduate School of the University of Massachusetts Amherst in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

September 2018

College of Education
Organized Anarchies in the Marketplace: Competition and Change in a Rural School District

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ABSTRACT

ORGANIZED ANARCHIES IN THE MARKETPLACE: COMPETITION AND CHANGE IN A RURAL SCHOOL DISTRICT

SEPTEMBER 2018

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The idea that competition improves schools is the current mantra of public education policy in the United States. Over the past three decades, parallel policy reforms across the country have increased school choice options for families, and held schools accountable to centralized standards based on the assumption that schools in high-competition/high-accountability environments would seek to improve their performance in order to survive and thrive. Despite these changes, widespread gains in student achievement have not been realized. The logic behind these reforms assumes schools and parents make rational decisions; however, the public education system is typified by unclear goals, incomplete and biased information, and ambiguous decision-making criteria, which makes rational decision-making difficult. In addition, school organizations resemble “organized anarchies” that make decisions based on a complex interplay of institutional pressures, socially-constructed information, political dynamics, and timing as opposed to utilizing rational processes (Cohen, March, & Olsen, 1972). This research illustrates this complexity through a qualitative case study of a traditional public school district in rural western Massachusetts using Cohen, et al.’s (1972) “garbage can” model of organizational decision-making that
shows how social, political, temporal, institutional, and market factors influence a school organization’s decisions in a high-competition/high-accountability environment. Data collected through stakeholder interviews, observations, and artifacts from sources such as local news media and social media show that during the 2016-17 school year the case study district’s decision-making centered around problems related to resources, academics, and student behavior, all of which were directly or indirectly related to family flight to other schooling options. Despite these serious threats to organizational viability, stakeholders were consumed by a debate over its high school’s “Indians” mascot. This case study provides an illustration of organizational decision-making that problematizes the assumption that regulations that increase competition and high-stakes accountability automatically focus school districts’ attention and energy on improving student achievement. It also suggests that values and beliefs can act as powerful motivators for school organizations to engage in deep change processes.
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CHAPTER 1

INTRODUCTION

Although it may be convenient to imagine that choice opportunities lead first to the generation of decision alternatives, then to an examination of their consequences, then to an evaluation of these consequences in terms of objectives, and finally to a decision, this type of model is often a poor description of what actually happens.

- Cohen, March, & Olsen, 1972, p. 2

Public education reforms based on school choice and standards-based accountability were intended to work hand-in-hand to improve schools by defining quality standards based on student achievement, and allowing parents to identify and access schools that met these standards. The basic theory of change in this market-based model posits that schools in high-competition/high-accountability environments would seek to raise student achievement, increase efficiency, and respond to parent and student needs and interests in order to survive (Lubienski, 2005). In the three decades since these reforms were enacted, all public K-12 schools in the United States are now responsible to meet accountability requirements set by centralized, state-approved authorizers, and most are exposed to competitive pressure through a variety of school choice mechanisms. However, widespread improvements in student achievement have not been realized.

These policies assume schools behave rationally; however, the conditions for rational decision-making are not met in the current public education system. Rational decision-making requires unambiguous goals, complete and accurate information, and clear weighting criteria (Stone, 2001). In the current system, goals are ambiguous, information is often incomplete and biased, and a school’s academic performance metrics are not the sole criteria parents use when making enrollment decisions for their children. In addition, teaching and learning processes are highly complex, and aggregate school performance reflects a shifting set of enrolled students.
In this context, school organizations resemble what Cohen, March, and Olsen (1972) call “organized anarchies” that are characterized by ambiguous goals, unclear technologies, and fluid participation. Cohen, et al. claim that these types of organizations make decisions based on a complex interplay of institutional pressures, socially-constructed information, political dynamics, and timing as opposed to utilizing rational processes. This research provides a case study of one traditional public school district using Cohen, et al.’s (1972) “garbage can” model of organizational decision-making in order to illustrate the ways in which social, political, and temporal factors influence a school organization’s decisions in a high-competition/high-accountability environment. I also use DiMaggio and Powell’s (1983) framework of “coercive,” “normative,” and “mimetic” institutional pressures to explore how an organization’s external environment also shapes decisions.

My selected case was the Gill-Montague Regional School District (GMRSD) located in rural western Massachusetts. This small district served fewer than 1,000 students in pre-kindergarten through grade 12 during the 2016-17 school year, and had been decreasing in size for decades due to population decline as well as competition from other available schooling options in the region. Because the district is funded on a per-pupil basis, the declining student population had resulted in the GMRSD having fewer resources. Due to these characteristics, this district represents a “critical” case I use as an illustration that disproves assumptions that school organizations in high-accountability/high-competition environments behave as predicted by market-based theories of change (Flyvbjerg, 2001). An illustration of the complex ways in which accountability and competition work in tandem to influence GMRSD decisions suggests implications for other school organizations that are subject to similar conditions.
Exploring the day-to-day decision-making activities of a traditional public school district in a high-accountability/high-competition environment illustrates the complexity of school organizations, and contributes to our understanding of how standards-based accountability and competition drive school organization change. This chapter outlines the problem, articulates the purpose of this research and states research questions, describes the basic methodology, and provides a rationale for the significance of this study. I end the chapter with a road map of the remaining chapters in this dissertation.

Problem Statement

The idea that competition improves schools is the current mantra of public education policy in the United States. Competitive school markets were predicted to increase the overall quality of schools by improving organizational efficiency, innovation, and responsiveness to parents and students (Belfield & Levin, 2002; Chubb & Moe, 1990; Friedman, 1955; Hoxby, 2003; Lubienski, 2005). These predictions reflect an ideological trend in western governments toward an economic model of society in which markets are the primary mechanism for social exchange, and individuals and firms make rational decisions that maximize their self-interests (Schmeichel, Sharma, & Pittard, 2017). Prior to the advent of current school choice policies, many public schools in the U.S. were already subject to a degree of competition due to family residential mobility. Policy reforms over the past thirty years have significantly expanded choice among existing schools, and added new options such as charter schools and vouchers for private schools, thus increasing overall competition. Parallel reforms—most notably the federal No Child Left Behind Act of 2001—set standards for student academic achievement and attainment that were intended to define school quality, and make it easier for parents to compare options. Instead of dramatic and widespread school improvements, competition has had mixed, generally unremarkable
results with regard to student outcomes (Kena, Musu-Gilette, Robinson, Wang, Rathbun, Zhang, Wilkinson-Flicker, Barmer, Dunlop Velez, 2015).

Large-scale education policy reforms are generally based on assumptions of linear, rational thinking that are prevalent in economics, positive science, and academic learning in general, yet these assumptions are problematic in complex socio-political organizations such as public schools (Schön, 1983; March, 2006; Burawoy, 1998). The current wave of market-based education reforms are grounded in the field of neoclassical economics, which views markets as networks of dyadic exchanges between individuals (or firms) focused on attaining value equilibrium (Stone, 2001). In other words, distinct producers and consumers engage in exchanges that are intended to be mutually beneficial. Market participants are assumed to use rational decision-making processes to determine how to maximize their self-interests when they engage in these exchanges (Mele, Pels, & Storbacka, 2015; Schmeichel, et al., 2017). In marketizing the institution of public education, reformers have positioned parents\(^1\) and school organizations respectively as consumers and producers that engage in exchanges through student enrollment. While complexity is recognized, even in the most traditional economic models, the influence of politics, institutions, and society on school and family decision-making is overshadowed by the assumption that rational decisions will be the dominant trend.

Rational decision-making requires a clearly defined problem or goal, complete and accurate information about options, and clear weighting criteria with which to evaluate options (Stone, 2001). The idea that holding schools accountable for specific academic performance metrics, and increasing competition among them, will improve students’ academic achievement is based on four assumptions. The first is that parents and schools all

---

\(^1\) Students are also involved in selecting schools, especially as they get older. For simplicity, I use “parent” to
have the same goal of student academic achievement and attainment, and adhere to common metrics of quality. Since the advent of the standards-based accountability education reform movement in the 1980s, school quality has been commonly defined by standardized test scores and graduation rates. The second is that all parents have access to complete and accurate information about schools’ performance. The third is that parents engage in rational decision-making processes in making school choices, and use these standardized measures of school performance to weigh their students’ options, which would motivate schools to improve them. The fourth is that all schools of choice that are available to each student are accessible in terms of enrollment and regular attendance. The literature base on school choice shows that all four of these assumptions are problematic.

First of all, the stated goal is ambiguous, and potentially conflicts with other goals that are operating for school organizations and families. On the school side, aggregate measures of academic achievement and attainment more often reflect the race and class of a school’s student body versus the strength of its instructional program (Zhang & Cowen, 2009). On the parent side, a school’s academic performance is only one of many factors they consider when selecting a school (e.g., Bifulco & Ladd, 2007; Schneider, Marschall, Teske, & Roch, 1998). Some schools attempt to meet the stated goal by improving their approach to teaching and learning; however, the literature shows that in competitive environments, schools more often increase marketing efforts, recruit target audiences, and/or attempt to limit competition by creating a niche for themselves or obstructing competitors (Hess, Maranto, & Milliman, 2001; Holley, Egalite, & Leuken, 2013). In addition, information about schools is incomplete, manipulated, socially-constructed, and biased based on race and class, all of which prevents parents from making fully informed choices (e.g., Bell, 2007; DiMartino & Jessen, 2016). Finally, accessibility barriers such as transportation, proximity to
quality schools, and school admissions lotteries prevent students from attending schools to which they technically have access (e.g., André-Bechley, 2007; Quiroz & Lindsay, 2015). Problems with goal clarity, information, and accessibility prevent rational decision-making processes. I present more detail and a summary of these findings in Chapter 2.

With regard to organizational decision-making, the market model of school enrollment was intended to devolve control to the most local levels of school governance (Chubb & Moe, 1990), yet local public school boards are significantly constrained by federal and state regulations (Kirst, 1994; Kogan, Lavertu, & Peskowitz, 2016). With a nod to Adam Smith’s characterization of markets as the “invisible hand” that shapes individual and organizational behavior, Jabbar (2016b) refers to school governance at all levels as the “visible hand” that sets the “rules of the game” in school markets by regulating such things as school openings and closings, accountability requirements, funding mechanisms, and student enrollment (p. 2). Federal, state, and even town governments make many decisions that constrain the ways in which public school organizations operate, and represent coercive institutional pressures (DiMaggio & Powell, 1983). In turn, these decisions heavily influence local school board decision-making processes when they exercise what little autonomy they have. To complicate matters, school organizations in market-based environments are expected to operate as self-interested businesses, as well as democratic bodies that are responsible to reflect the values and will of their communities (Tracy, 2007). Tensions between multi-tiered government regulation, and the assumption that school districts are able to make self-interested organizational decisions are apparent in the literature. I provide more detail in Chapter 2.

In a public education system characterized by ambiguous and conflicting goals, incomplete information, family participation barriers, and constrained local decision-making,
I argue that the prospect that school organizations will make rational decisions that produce the predicted outcomes is unlikely. A typical research approach regarding school competition is to investigate the extent to which competition increases student achievement and/or school performance, and to posit why it is or is not working (e.g., Belfield & Levin, 2002). Another common approach is to investigate parent or school behavior in a competitive setting, and then rationalize these behaviors as affirmations or breakdowns of the predicted processes (e.g., Bell, 2009; Kleitz, Weiher, Tedin, & Matland, 2000).

The literature base on school choice and school competition almost exclusively stays within assumptions of rationally-operating schools and families. To my knowledge, only one study on school choice questions the baseline assumption of rational decision-making. Ben-Porath (2009) found that parents tended to satisfice in their children’s school enrollment decision processes by making intuitive or emotional decisions about schools when information was not immediately accessible. Otherwise, the literature is comprised of studies that identify barriers to rational decision-making processes, or propose other rational criteria that appear to be at work without questioning whether or not it is realistic to expect rationality.

In addition, while the literature on school choice and standards-based accountability focuses on regulatory pressures that influence school decision-making, it is relatively silent on the effects of normative pressures that influence organizational change in public PK-12 education. While some researchers have indicated that there are normative conflicts between individual choice-based systems and social welfare systems (e.g., Taylor-Gooby, 2008), and have pointed out that the quasi-markets that have formed in the public education sector through increased school choice corrupt market-based incentives due to their social welfare goals (Lubienski, 2005), there are no studies to my knowledge that directly examine the
effects of normative institutional pressures on school change. This research provides an alternate perspective by illustrating the decision-making processes of a traditional public school district using a model that takes social and political dynamics into account.

**Purpose and Research Questions**

This research sought to describe and make sense of the decision-making processes of one traditional public school organization situated in a high-accountability/high-competition environment. The primary research question of this study was, “What social and political dynamics were involved in a traditional public school district’s organizational decision-making concerning its schools’ reputations and student learning over the course of one year?” The case I selected was the Gill-Montague Regional School District (GMRSD), a small, rural, traditional public school district in western Massachusetts that faces high levels of competition through a variety of school choice opportunities that are available to students who live within its attendance zone, and that is subject to mandatory accountability requirements for student achievement and attainment that are set by the state.

To answer this primary question, I used Cohen, March, and Olsen’s (1972) garbage can model to map the GMRSD organization’s decision-making processes, and a systems approach developed by Williams and Hummelbrunner (2011). To limit complexity in the system, I used a sampling strategy that limited it to elements that were referenced in the GMRSD school committee (i.e., school board) meetings and associated materials during the 2016-17 school year. Since the school committee is the organization’s local governing body, and primary public forum for district issues, information sharing, social interaction, and political action, this sampling strategy allowed me to consider a representative, yet

2 For an interactive map of the GMRSD marketplace of public schools, see: [http://westfield.maps.arcgis.com/apps/View/index.html?appid=58be37191f9d49fbbec5fc3df7d9acde](http://westfield.maps.arcgis.com/apps/View/index.html?appid=58be37191f9d49fbbec5fc3df7d9acde)
manageable, set of decision-making processes. I describe the model and the larger conceptual framework in the next section. The following sub-questions guided my data collection and analysis:

1. *What problems, solutions, participants, choice opportunities, and decisions appeared in GMRS\textsuperscript{D} school committee meetings and materials between July 1, 2016 and June 30, 2017?*
   a. Who or what brought these elements into/out of the system, and when?
   b. Who framed and categorized these elements, assuming differing perspectives?
   c. Who made the decisions?

2. *How did these elements interrelate?*
   a. What connections/disconnections among elements occurred?
   b. How did participant attention affect these interrelations?
   c. What sources of power were employed, by whom, and for what purpose?
   d. How were decisions made (i.e., deliberation, flight, or oversight)?

3. *How did institutional and market pressures affect the decision-making system?*
   a. What expectations and assumptions appeared in the system?
   b. How did stakeholders make sense of these expectations and assumptions?
   c. What groups were/were not target audiences, and why?
   d. What myth-making and strategic branding occurred, and why?

**Conceptual Approach**

Organizational theorist James March (2006) explains that “the basic rational rubric has become an almost universal format for the justification and interpretation of action and for the development of a set of procedures [...] that are accepted as appropriate for organizations pursuing intelligence” (p. 202). What is common in the school choice literature
are assumptions that public school organizations are primarily responsive to regulatory pressures in their environments, plus critiques of market-based schooling that point out where rational processes break down under imperfect conditions, or that focus on the rational choices of individuals. A more applicable conceptual framework to explore the decision-making processes of schools and public school districts comes from behavioral and adaptive organizational theories that recognize the existence of political conflict, the limits of rationality in complex systems, and the social and political effects of institutional fields (Cyert & March, 1963; Powell, 2007). A dual approach that allows exploration of internal organizational processes and external influences in the field was necessary.

I chose Cohen, et al.’s (1972) garbage can model of organizational decision-making to analyze internal processes, and DiMaggio and Powell’s (1983) theory of institutional isomorphism to analyze how external pressures within institutional fields affect these internal processes. To consider the interplay of internal processes and external pressures, I drew from a systems framework developed by Williams and Hummelbrunner (2011) that defines a system as boundaries, elements, and links. They state that by thinking systemically, one can consider how and why elements cross through the boundary, how elements interrelate once inside by linking and unlinking, and with what consequence. In addition, they posit that how one sees, interprets, and makes sense of a system and its parts depends on one’s perspective, which is shaped by the ways in which one is influenced by external pressures in the field.

Williams and Hummelbrunner’s (2011) systems framework aligns well with Cohen, et al.’s (1972) garbage can model in that it considers how decisions are generated by elements that interrelate within a defined decision-making arena. Cohen, et al. (1972) developed the model based on theories from the fields of sociology and political science in order to analyze the decision-making processes of what they call “organized anarchies.” These are
characterized by ambiguous goals, unclear technologies, and fluid participation, and they cite schools as prime examples. According to the model, independent streams of problems, solutions, participants, and choice opportunities flow into decision arenas where they interact, connect, and disconnect with each other for various reasons. The system is loosely-coupled in that these elements retain their separateness and unique qualities when linked together (Weick, 1976). According to the model, decisions generated by this system may or may not solve problems, and are more the products of timing, available attention and energy, individual interpretations, and power dynamics, and less of linear, rational processes.

External to this system, DiMaggio and Powell (1983) theorize that organizations that share space and resources tend to become more similar through a process called institutional isomorphism as they adhere to common regulations and expectations in their efforts to appear legitimate. Meyer, Scott, and Deal (1980) describe the significant efforts school organizations devote to cultivating commonly accepted symbols of legitimacy (e.g., accreditation, and a focus on core academic subjects) as strategies that help them to adapt to their institutional environments. In the current policy environment, public school organizations are subject to centralized standards of legitimacy from their authorizers, as well as decentralized standards of legitimacy from their “customers” (i.e., parents and students) in the marketplace. In other words, public schools are expected to meet set standards for their students’ academic achievement and attainment in order to avoid sanctions at the regulatory level, and are also expected to cultivate brands that are interpreted by families as being high quality in order to avoid losing resources to competing schools. School organizations that are perceived as meeting institutional as well as consumer expectations in competitive market environments stand a better chance at survival (Davies & Quirke, 2007).
While organizational attributes that convey institutional legitimacy and customer appeal tend to overlap, these pressures can also conflict with each other. For example, institutional pressures to maintain high test scores may conflict with parent preferences for progressive instructional approaches over those that appear to “teach to the test.” In addition, a school’s day-to-day work to meet its enrolled students’ needs may conflict with the image it hopes to project. For example, a school that enrolls high proportions of students who have been affected by traumatic experiences may need to devote significant resources to developing and maintaining a safe and supportive emotional environment in order to help students to be ready to learn academic content, instead of focusing primarily on supporting rigorous academic programs. As described earlier, rational decision-making is negatively affected when there are competing goals.

When there is conflict between internal and external demands, formal structures and internal operations become loosely-coupled, allowing them to function separately with externally-facing elements being largely symbolic (Meyer & Rowan, 1977; Meyer, Scott, & Deal, 1980). This process of “myth-making” (Meyer & Rowan, 1977) allows the organization to project images that conform to institutional expectations and consumer preferences while simultaneously engaging in necessary technical work. In contrast to reformers’ assertions that competition among schools improves their ability to drive student achievement, this indicates that competition may incentivize brand development, which may or may not be linked to student learning or academic achievement.

Identifying what is considered legitimate and appealing, and by whom, is one way to recognize power. Groups whose preferences and definitions of legitimacy are prioritized by school organizations can be considered target audiences, yet these audiences can also be in conflict with one another. A school organization may have a difficult time developing
appearances that align with authorizer requirements, as well as the preferences of distinct
groups of families in the marketplace, especially if these audiences have competing
conceptions of school quality. Within a decision-making arena, individuals in authority
positions have the power to frame problems and direct decision-making processes, while
those with less authority may still maintain influence by directing attention or taking other
forms of political action (Mechanic, 1996; Salancik & Pfeffer, 1996). In contrast to market-
based assumptions that decision-making is rational and linear, power dynamics in a decision-
making system heavily influence what problems and solutions are considered, how they are
understood, what goals are prioritized, and how and when decisions are made.

This conceptual framework–based on the assumption that there are competing goals
in the regulatory and market environment, and that organizational decision-making is
influenced by social and political dynamics–allows exploration of the efficacy of rational
models of school improvement. Applying this framework to a traditional public school
district in a high-accountability/high-competition context illustrates how current education
reform efforts operate within a specific community in real time.

**Overview of Methods**

Considering local context is a key aspect of behavioral theories of organizational
decision-making (March, 2006). In this research, I describe and analyze the decision-making
processes of a traditional public school organization in a competitive environment through a
qualitative case study using the conceptual framework described above. In order to engage in
a productive analysis of this incredibly complex organization and field, I used a sampling
strategy that limited consideration to system elements that surfaced in the case organization’s
school committee meetings during the 2016-17 school year. This is the local governing body,
and high-level organizational decision-maker. As an elected body, it is squarely situated in a
political arena, and its meetings are the primary public forum in which many organizational elements are present and documented. As such, school committee meetings provide a representative sample of organizational decisions to examine as well as a window into the social and political dynamics of the organization and its stakeholders. Bounding the system in this way biased the system toward publicly viewed and debated topics—the proverbial tip of the iceberg with regard to the vast number of decision-making processes that occur among the full set of organizational stakeholders—yet allowed examination of decisions that were most directly influenced by institutional and market pressures due to their highly public and symbolic nature.

The Gill-Montague Regional School District is a “critical” case (Flyvbjerg, 2001; Miles & Huberman, 1994) in that it faces high levels of competition as the direct result of state school choice policies, and is also subject to strict accountability requirements for student achievement and attainment that are set by the state. The GMRSD is also situated in a marketplace that forces it to compete for students. Within a 20-mile radius, there are approximately 60 traditional public schools across 20 districts, a nearby vocational-technical high school, four charter schools, several elite private schools, and homeschooling options. In 2016-17, the GMRSD had a lower state rating than all of the other public schools in its marketplace. Two consequences of low performance are an official state label that indicates low organizational quality, which can negatively affect a district’s reputation, and increasing loss of autonomy. That year, approximately thirty-five percent of the district’s default students (i.e., those who live in the three towns served by the district) elected a school option outside of the organization. These student enrollment losses represent significant reductions in state and local funding for the organization. A critical case is one that can affirm or disprove a concept by illustrating a “most likely” or “least likely” scenario
(Flyvbjerg, 2001). If the combination of high accountability pressure, and high competitive pressure improves schools based on rational market models, it would most likely drive school performance improvements in the GMRSD, yet the findings of this research take into account political and social dynamics that illustrate problematic aspects of this market-based theory of change.

The purpose of a descriptive case study is to elucidate the social and political world by situating knowledge and understanding in a local context (Schaffer, 2016). I used an interpretivist approach that is uniquely suited to examine real-life organizational decision-making processes by recognizing that individuals create meaning and take action based on different interpretations of the same elements (Geertz, 1973). To understand the local context, I used ethnographic tools that included interviews, artifact reviews, and observations to study the GMRSD school committee’s decision-making system. In phase one, I mapped the basic system using minutes from school committee meetings that are posted online. In phase two, I used additional data from interviews, observations, and other artifacts (e.g., social media, news media, and state reports) to add detail and historical context, represent various perspectives, and analyze interrelationships among system elements. I provide additional detail about the case and methods in Chapter 3.

**Rationale and Significance**

Positioning school organizations as producers in competitive markets was predicted to increase student achievement, improve school efficiency, and prompt innovations in teaching and learning. These outcomes have not yet been realized after over three decades of marketizing the public school landscape, even with the added clarity of standardized metrics that are intended to indicate school quality. The research literature on school competition overwhelmingly assumes individual and organizational actors are making rational decisions,
and tends to attribute lackluster outcomes or outright failures to logistical barriers, or lack of clarity around the primary goal. Due to the fact that schools are social and political organizations that meet the criteria for “organized anarchies” (Cohen, et al., 1972), it is important to consider their decision-making processes within a framework that assumes complexity, ambiguity, multiple interpretations, and power. It is also important to consider institutional pressures aside from those created by regulations and policies.

The highly politicized nature of education reform is another reason this research is important. Many of the organizational and societal outcomes of school competition are explained and rationalized after the fact in ways that are sometimes intended to advance a political argument. For example, Lubienski, Weitzel, and Lubienski (2009) showed that education research on school choice and competition functions as a kind of political economy of knowledge in which dominant findings are used as the basis for policy analysis. While this study is not intended to take sides on the school choice debate, it is intended to produce an exemplar of organizational responses to accountability mandates in a competitive school marketplace that takes human behavior and institutional pressures into account. This can add a new perspective to the policy conversation about how to increase educational equity and student access to quality schools.

Chapter Organization and Overview of Findings

This introductory chapter provided an overview of the problem, the research purpose and questions, and qualitative research methods designed to describe and analyze the decision-making processes of one school organization in a competitive environment using a conceptual framework that allows consideration of the roles of timing, politics, socially-constructed meaning, and institutional pressures. This study considered the effects
of competitive school markets from an alternative perspective to the rational model common in the fields of economics and business, and which dominates the literature.

In Chapter 2, I provide detail about the literature on school choice, accountability, and market-based competition among schools, as well as a conceptual framework based on systems thinking, and new institutional theory. The literature review establishes the ways in which rational decision-making processes are not supported in competitive school markets at individual student/parent or school organizational levels, and provides evidence that school organizations are more likely to respond to competitive pressures by increasing marketing, and/or through political action than by attempting to improve teaching and learning. I then outline a conceptual framework based on systems thinking that includes the garbage can model (Cohen, et al., 1972) and the theory of institutional isomorphism (DiMaggio & Powell, 1983) that I used to explore organizational decision-making processes in ways that do not assume rationality.

In Chapter 3, I provide detail about the study’s methods. This includes a rationale for conducting a qualitative, descriptive case study of one school organization in a competitive environment. I provide detailed information about the GMRSD case, and justify its applicability as a critical case that illustrates the day-to-day effects of two primary and mutually reinforcing education reform policies: standards-based accountability and school competition. I review literature on the purpose and functioning of school boards in the U.S. in order to situate them in the greater landscape of school governance and decision-making, as well as to provide a rationale for focusing my analysis on a system bounded by school committee meetings. I outline my sampling, data collection, and data analysis strategies, and rationalize how I used them to answer the research questions. I address ethical considerations, as well as my positionality as a researcher in this setting.
In Chapter 4, I map the GMRSD system using the garbage can model, and provide extensive details about system elements. This includes primary participant groups, an overview of decisions generated during the case study year, and extensive descriptions of the major system issues that captured participant attention. The primary issue was a debate over the high school mascot, and this constituted most of the system’s activity. In addition, system elements included increasing diversity and student need in the schools, community engagement and school reputations, a growing sense of responsibility to serve all students, ineffective academic programs, disruptive student behavior and bullying, and patterns of family mobility and school choice. Overall, these system elements indicated attention to the district’s need to adapt to changing conditions in its environment.

In Chapter 5, I describe the activity of the system to explore what happened. I start in with an overview of high-level organizational decisions produced, describe how participant attention was directed, and then tell the story of system activity over the course of the year, including various perspectives. I describe three distinct cultural groups within the organization that emerged through these data, and explore social and political dynamics. I describe decision-making processes and system activity. This includes how and where participant attention and energy were directed, culture clashes between distinct groups that formed around their perspectives on the mascot issue, political dynamics and strategies used by these groups, and participant learning.

In Chapter 6, I discuss four themes that emerged from these data. The first is that increased accountability to centralized authorities, and increased competition among schools adds load to garbage can systems, which decreases the likelihood that they engage in deliberative decision-making (Cohen, et al., 1972). The second is centered on the GMRSD’s mascot debate, which illustrates how organizational culture change appears to motivate
stakeholder engagement. Third, system activity focused on the mascot also shows how normative institutional pressure can be an effective driver of school change. Finally, I discuss how the social and political dynamics of school district leaders affect organizational learning and change. I conclude by outlining implications in the public education field.
CHAPTER 2
COMpetition AND ACCOUNTABILITY AS PROBLEMATIC DRivers OF SCHOOL IMPROVEMENT

Introduction

Creating a competitive market system of school provision and enrollment through increased choice was intended as a school improvement mechanism, and ultimately a means to increase student academic achievement and attainment, especially for those who are traditionally disadvantaged by the educational system. Advocates of market-based reforms relied on rational ideologies that are dominant in strategic management and economics to predict that schools would improve their performance in order to be appealing to parents who had a range of options (e.g., Chubb & Moe, 1990; Friedman, 1955). Critics have strongly suggested that the quasi-public attributes of schooling “short circuit” the logic behind market-based incentives (Lubienski, 2007). Through the parallel standards-based accountability movement, school quality has come to be largely defined by aggregate measures of students’ academic achievement and attainment such as standardized test scores and graduation rates. The school reform strategy, therefore, relies on parents using this narrow conception of quality when making school choices, and school organizations using it when making decisions about how to improve. The literature provides evidence that these assumptions are problematic.

In this literature review, I outline the market framework and assumptions that underlie market-based strategies of school reform, then review research on school provision and enrollment in competitive school markets, and the extent to which these reforms have attained the expected results. Due to the plethora of ideologically-motivated research and reports on school choice, I limited my review of the existing literature to peer-reviewed
articles in order to control for some of the potential bias. This literature provides evidence that rational decision-making is impaired by goal ambiguity and conflict in competitive school markets. In addition, inaccurate, missing, or manipulated information, as well as participation barriers disadvantage groups these reforms were expected to help. Researchers describe the ways in which rational decision-making processes break down (e.g., lack of parent access to information), or operate in unanticipated ways (e.g., schools recruiting high-performing students to raise their performance metrics). There is a gap in the literature with regard to alternative perspectives on organizational behavior that take into account social and political factors that are embedded in complex organizations and institutions, and affect how they make decisions.

To address this gap, I present a conceptual framework based on new institutional theories that assume organizations contain conflicting interests, limitations on rational processes, and pressures to conform to institutional norms (e.g., Cyert & March, 1963; DiMaggio & Powell, 1983; March & Olsen, 1984). I describe Cohen, March, and Olsen’s (1972) garbage can model of organizational decision-making as a framework with which to illustrate school organizational behavior from this alternate perspective. I use DiMaggio and Powell’s (1983) framework of coercive, normative, and mimetic institutional pressures to show how external environments affect organizational decision-making. I situate the marketing concept of brand in an institutional realm by conceptualizing it as the manifestation of an organization’s interactions with and responses to institutional expectations and assumptions.

**Market-based School Reforms in the United States**

In this section, I present the basic market model, and explain the rationale behind reform efforts that shifted school enrollment and provision to a competitive market system.
I then present findings from literature on school choice and school competition. These findings provide evidence of goal conflict and ambiguity, information problems, and participation barriers that prevent rational processes from working as planned. I then explicate the ways in which local school governance is significantly constrained by federal and state-level policies in terms of its role and influence in a significant education reform effort. Finally, I make a case that the literature to date is biased toward assumptions of rationality in how schools make decisions that are problematic in terms of making predictions about how complex socio-political organizations respond to policies.

The Market Framework

The use of rational technologies is evident in our current policy focus in the U.S. on technical solutions to societal problems, and a shift toward envisioning markets as the primary mechanism for social exchange (March, 2006; Schmeichel, et al., 2017). Market-based strategies for school reform are based on technical rationality that is dominant in economics, business, positive science, and academic scholarship (Burawoy, 1998; March, 2006; Schön, 1983). This ideology has been embedded in western society since the Enlightenment, and became especially dominant through the rise of technology in the nineteenth century (March, 2006). To start, I explain why a market system was perceived as a viable improvement strategy for students’ and schools’ academic performance. I then highlight evidence in the literature that problematizes this strategy based on the democratic nature of public education.

The field of neoclassical economics views markets as networks of producer-consumer exchanges focused on attaining value equilibrium (Mele, Pels, & Storbacka, 2015). At its most basic level, a market is conceptualized as collections of individuals or single organizations that link up through these exchanges, and success is measured by the extent to
which both sides consider the exchange to have resulted in gaining something of value (Pettinga, Angelov, & Bateman, 2015; Stone, 2001). In a market-based system, individuals and organizations are self-governing, and are assumed to rationally assess the costs and benefits of various alternatives when making decisions in order to maximize their self-interests (Schmeichel, et al., 2017; Stone, 2001). Rational decision-making requires a clearly defined problem or goal, complete and accurate information about options, and clear weighting criteria with which to evaluate these options in order to make the most optimal decision. Market-based education reforms positioned parents and schools respectively as consumers and producers that engage in exchanges through student enrollment.

Market-based school reforms are often traced to the views of economist Milton Friedman, who questioned the role of government in education, and proposed that empowering families to engage in voluntary exchanges with schools would lead to increased organizational efficiency, greater school responsiveness to family needs, and improved academic performance as schools attempted to meet quality expectations defined by aggregate student performance metrics (Friedman, 1955). Friedman’s focus was generally on creating voucher systems that would allow families to access private schools in addition to existing public schools. In line with Friedman’s use of free market theory to improve access to quality schools, Chubb and Moe (1990) argued in their highly influential book Politics, Markets, and America’s Schools that competing political interests regarding public schools thwart the rational decision-making processes necessary to make successful market exchanges by fostering contested definitions of problems, unclear response strategies, and intuitive responses.

Chubb and Moe (1990) strongly recommended a hyper-local system of school provision within which schools and their enrolled families could decide their own goals, as
opposed to a wider set of community members who had less of a personal stake in schools and brought other political agendas. They criticized what they referred to as a politically-motivated “grab-bag” approach to education reform, and claimed that a system in which schools and families had complete autonomy was the only way to avoid “failure and disappointment” (p. 218). Perhaps as direct evidence of Chubb and Moe’s (1990) claim that politics undermines our public education system, research on the effectiveness of market-based school reforms can be highly ideological among proponents and opponents (Lubienski, Weitzel, & Lubienski, 2009; DeBray-Pelot, Lubienski, & Scott, 2007).

The standards movement in education reform evolved in parallel to the school choice movement. It defined the problem of public education not as centralized governance, but as inequitable academic achievement and attainment based on race and class. The primary reform goal was reducing this “achievement gap,” and it was enshrined in federal law in the No Child Left Behind Act of 2001 (NCLB, 2002). This law rendered Chubb and Moe’s (1990) idea of school-based autonomous goal-setting impossible due to federal laws (and indirectly, state laws) that held all public schools accountable to the same set of requirements within each state.

Based on NCLB’s focus on outcome measurement and accountability, school performance became synonymous with aggregate student scores on standardized tests in reading and mathematics, and other metrics such as graduation rates. Under the goal to raise all students’ academic achievement—and with school choice remaining politically popular despite true market conditions being absent—the rational assumption was that parents who had options would choose the highest performing school, and schools would focus improvement efforts and innovations in the areas of curriculum, instruction, and teacher competencies in order to attain higher performance measurements. The literature shows that
these assumptions proved problematic in ways that mirror Chubb and Moe’s (1990) criticism about how political influences negatively affect school functioning.

School and Family Behavior in Competitive Markets

School choice options and competition among publicly-funded K-12 schools in the U.S. have expanded significantly over the past thirty years (Kena, Hussar, McFarland, De Brey, Musu-Gillette, Wang, Zhang, Rathbun, Wilkinson-Flicker, Diliberti, Barmer, Bullock Mann, & Dunlop Velez, 2016). As a result, increasing numbers of students have more school options, and traditionally disadvantaged students are enrolling in schools of choice to a greater extent than before (Grady & Bielick, 2010; Kena, et al., 2015). The most common of these policy changes that were intended to increase choice and competition include: opening enrollment options between and within existing public school districts (i.e., interdistrict and intradistrict choice), adding public charter schools to local education markets, and providing publicly-funded vouchers for private school tuition (as Friedman had advocated).

Traditional public schools have increasingly been required to recruit and retain students because they no longer have guaranteed attendance zone enrollment due to these types of increased choice options for families. Theoretically, the expected improvements to student achievement and school performance should be occurring due to increased competition, yet the research provides evidence that these assumptions are problematic based on goal ambiguity and conflict, inaccurate, missing, or manipulated information, and participation barriers in competitive school markets across the country. I outline evidence of each of these problems in this section.

Goal ambiguity and conflict. The stated goal of academic achievement and attainment for all students is ambiguous in terms of how these are defined. Federal and state policies attempted to reduce ambiguity by defining academic achievement as student
performance on standardized tests in a narrow set of academic subjects (primarily reading, writing, and mathematics), as well as grade-level promotion and high school graduation rates (i.e., how well students are succeeding according to standardized progress expectations). These measures are a common proxy for student achievement and school performance in the literature (e.g., Belfield & Levin, 2002; Labaree, 2010), and many parents use this definition of school quality (Schneider, Marschall, Teske, & Roch, 1998; Tedin & Weiher, 2004).

A complication that arises is that aggregate measures of academic achievement and attainment more often reflect the race and class of a school’s student body versus the strength of its instructional program (Zhang & Cowen, 2009). Defining the goal for schools as improving or maintaining quality as defined by student achievement and attainment metrics, and for parents as enrolling their children in quality schools based on this definition, incentivizes schools to influence their aggregate metrics in any way possible. This could be accomplished by improving individual student scores, but it could also be accomplished by recruiting and retaining more advantaged students who traditionally score at higher levels.

Schools’ improvement strategies depend to some extent on the demographic characteristics of their target audiences. Some parent groups rely more heavily on assessing school quality through published test scores, including economically disadvantaged, black, and/or Latinx parents (Schneider, et al., 1998), and parents of students who are not at risk of poor academic performance (Tedin & Weiher, 2004). Schools that enroll high percentages of these students, or that actively recruit these groups, are therefore incentivized to “teach to the test,” which can narrow the educational experiences of their enrolled students. On the other hand, wealthier and/or white parents interpret progressive teaching and learning methods—such as portfolio assessment—as evidence of school quality (Schneider, et al.,
Rothstein (2006) found that if school leaders perceived that desirable parents were seeking schools based on their test scores, then they would focus on improving them, yet others have found that competition does not necessarily incentivize schools to focus school resources on academics (Arsen & Ni, 2012). The sheer complexity of interactions between race, class, and student academic achievement and attainment make it extremely difficult, if not impossible, to determine exactly how schools and parents define school quality, and how schools respond to the demand for quality from their primary audiences.

Ambiguous definitions of quality aside, the first assumption of the market model is that parents would make rational decisions to enroll their children in high-performing schools (however they define this). The literature shows that many families do choose schools based on perceived academic performance (Bast & Walberg, 2004; Kleitz, Weiher, Tedin, & Matland, 2000), although this is more of a priority at the secondary level than at the elementary level (Kimelberg, 2014; Rabovsky, 2011). However, there is strong evidence that parents also choose schools based, at least partly, on the race- or class-composition of the student body of the schools they are leaving, and/or the schools they are seeking to enter, regardless of the school’s overall academic performance (Billingham & Hunt, 2016; Schneider & Buckley, 2002). The literature also shows that parents choose schools based on proximity to home, which often have race- and class-based elements due to residential segregation (Bifulco & Ladd, 2007; Kleitz, et al., 2000). If parents are making decisions based on race or class, the assumption that schools in competitive environments are incentivized to improve student achievement becomes problematic.

It can be difficult to discern exactly how race and class drive parents’ school decisions since these are taboo subjects. Schneider and Buckley (2002) attempted to control for this by analyzing anonymous parental search patterns in an online school choice database.
in Washington, D.C. They found that parents of all races were actively looking for schools with lower percentages of black students, even when they controlled for academic performance preferences. Using nationally-sampled survey data regarding a similar type of process for hypothetical schools, Billingham and Hunt (2016) found the same trend for white parents. These studies credibly support the idea that avoiding black students is a school choice goal for many parents. This is in addition to findings that students of all races choose schools with higher percentages of white students than the ones they leave (Holme & Richards, 2009; Rabovsky, 2011; Saporito, 2003; Welsch, Statz, & Skidmore, 2010), which does not necessarily imply that this was the goal, but merely a byproduct of perhaps a general assumption that schools that enroll more white students are of higher quality.

The perceived safety of a school can be a deciding factor for parents, and this can also be linked to race and class. All parents prioritize school safety, yet this becomes a priority goal for those who have experienced unsafe schools in the past (Kleitz, et al., 2000). Parents in this category tend to be poor, black, and Latinx (Schneider, et al., 1998). Related to the race-based goals described above, children’s safety is often used as a more socially acceptable proxy for concerns that are based directly on race and class (Roberts & Lakes, 2016). School proximity to home can be a participation barrier, which I explain below, but it is also a safety factor. Irrespective of race and class, some parents simply trust known environments more than unknown ones, and their primary goal is to choose a school close to home rather than a higher-performing school (Bell, 2009a, 2009b; Jacobs, 2011). Complicated sociological factors related to race and class make it difficult to know exactly what parents’ goals are in choosing a school. Often these reasons overlap and can be vaguely articulated.
To compete, some schools do attempt to improve their approach to teaching and learning, especially if their performance metrics are not meeting minimum accountability requirements as defined by their authorizers (Holme, Diem, & Welton, 2014; Jabbar, 2015); however, the literature shows that schools more often respond to competition through marketing or political action. On the marketing side, schools are incentivized to recognize and meet parents’ goals, and to focus their efforts on desirable target audiences to increase efficiency. Hess, Maranto, and Milliman (2001a) found that charter school competition is associated with a short-term increase in traditional public school communications and outreach, except in highly centralized schools that showed a decrease in these areas unless the competition level was extremely high. Strategies to recruit higher-performing students are sometimes referred to as “cream skimming” (or the inverse, “cropping”). These are common criticism of charter schools, and there is some evidence that this occurs (Cummins, Ricciardelli, & Steedman, 2014; Jabbar, 2015, 2016a), but is not as widespread as claimed (Lacireno-Paquet, Holyoke, Moser, & Henig, 2002). On the other hand, many charter schools operate under mission-driven goals to support disadvantaged students, and intentionally recruit them (Bifulco & Ladd, 2007). The latter is an example of niche marketing, which is another competitive strategy.

Studies have found that schools’ themes, brochures, logos, and even names—whether traditional public, charter, or private—are intended to send signals to target audiences (Ancess & Allen, 2006; DiMartino & Jessen, 2016; Jabbar, 2015; Lubienski, 2007; Oplatka, 2004). While these signals to target audiences may be intended to convey messages about academic quality (e.g., a school with “academy,” or “college preparatory” in its name), a thematic focus such as STEM (science, technology, engineering, and mathematics) can also function as a strategy to limit competitive pressure through niche marketing (DiMartino &
Jessen, 2016; Hess, Maranto, & Milliman, 2001b). Some traditional public schools in urban areas specifically work to recruit middle-class white families who live nearby due to the relatively high academic performance of these students, and social/economic capital of their families (Cucchiara, 2008; Kimelberg & Billingham, 2012; Posey-Maddox, Kimelberg, & Cucchiara, 2014; Roberts & Lakes, 2016). Interestingly, these studies also highlight another parent goal, which is to affirm their social and political identities as open-minded progressives who seek to support their local urban schools. Some schools encourage parents to participate in recruitment and outreach efforts, and intentionally motivate them by citing competitive threats (Olson Beal & Beal, 2016). None of these marketing and recruitment strategies directly apply to schools’ approaches to curriculum and instruction.

Geographic factors shape school enrollment, and can be used strategically to recruit students. Some cities create school assignment mechanisms and gerrymandered school attendance zones that privilege traditionally advantaged families in order to lure them into enrolling in urban public schools near their homes (Ayscue & Orfield, 2015; Billingham, 2015; Richards & Stroub, 2015). Some schools that have the ability to select their location consider parents’ proximity and safety goals when making this choice. For example, Smrekar and Honey (2015) found that parent perceptions of school quality are influenced by neighborhood reputations. They proposed that magnet schools could serve as race- and class-integration mechanisms by strategically siting them in ways that meet the location preferences of a diverse set of parents.

In many metropolitan areas, charter school policies specifically encourage or even require schools to be located in areas with many low-performing schools in order to provide higher quality options for residents. When parents in these areas perceive these schools as high-quality alternatives—justified or not—this can contribute to clustering students into
certain schools, and exacerbate school segregation based on race and class (Frankenberg, Siegel-Hawley, & Wang, 2011). Lubienski, Gulosino, and Weitzel (2009) found that for-profit charter schools tend to locate themselves at the geographic edges of areas with the highest need (especially when policies limit charter schools to these areas) in order to attract more students who have lower levels of need. Gulosino and Lubienski (2011) broadened their examination of these types of competitive incentives, and found that they affect charter, district, and private schools similarly in terms of their decisions to open, close, and relocate relative to socioeconomic and demographic contexts. These examples highlight explicit organizational goals to make urban schools whiter and wealthier, ostensibly to improve performance metrics by increasing the percentage of advantaged students, which could further disadvantage poor students of color (Cucchiara, 2008).

Political dynamics also shape how schools respond to competition. Some school and government organizations attempt to limit competition by obstructing or publicly dismissing competitors. Holley, Egalite, and Lueken (2013) found that these strategies included blocking access to buildings, creating legal obstacles, denying charter school applications, freezing or delaying payments to charter schools, and developing regulations that restrict choice or competition. In Arizona, Hess, Maranto, and Milliman (2001b) found evidence that traditional public schools that lost high percentages of students to charter schools responded by vilifying competitors, or attempting to absorb them. Political action is commonly associated with charter schools, yet Henig, Holyoke, Lacireno-Paquet, and Moser (2003), found that charter school and traditional public school operators and advocates equally used political action to respond to competitive pressure, and criticized the perspective that there are noticeable differences between these sectors in this regard.
In the context of ample evidence of competing goals in competitive school enrollment environments, it is important to consider two institution-level goals with regard to the fields of markets and public education. In the institution of markets, the ultimate objective of any organization is to engage in sufficient exchanges that serve to maintain or improve its market position and organizational viability (Powell, 1990). In other words, schools in marketized environments seek to stay in business. In fact, this is an essential component of the argument that competition will improve the overall quality of schools in a marketplace; low-performing schools that cannot attract students close and make room for better schools that can (Chubb & Moe, 1990; Hoxby, 2000, 2001).

As illustrated by the literature cited above, some school organizations seek to remain viable by attempting to improve teaching and learning, but strategic marketing and recruitment, manipulating enrollment mechanisms, and/or political action to diminish competitive threats appear to be more common responses in market settings. Arsen and Ni (2012) found that there were no discernible differences in how schools allocated their resources in response to increased competition (e.g., toward instructional and/or non-instructional functions), and whether or not they were successful in maintaining organizational viability.

In the institution of public education, there are conflicting ideas about the purpose of school. Labaree (2010) outlines three competing goals that are evident in the history of public education in the U.S.: providing a foundation for democratic participation, providing common socializing experiences to a diverse population while preparing a diverse workforce, and providing opportunities for individual social mobility. In the market model, individual needs are prioritized. School choice policies are intended to increase family control, as was Chubb and Moe's (1990) idea to ensure school autonomy at the local level. However, federal
law since NCLB has been aligned to the purpose of educating everyone by ensuring full access and equity. In addition, most schools continue to be structured to educate an industrial-era workforce. In this context, there is tension between the ideals of autonomy and equity. As such, the wide variety of conflicting goals should come as no surprise.

**Information barriers.** For rational decision-making to occur, information must be accurate and complete, yet information in markets is always incomplete, socially-constructed, and manipulated (Stone, 2001). On the parent side of the school choice equation, this prevents families from making informed choices about schools. To address this problem, some governments attempt to regulate school information in order to prevent inaccuracies, misinterpretations, and gaps, and there is evidence that this helps parents to choose higher-performing schools (Rich & Jennings, 2015; Yettick, 2014). For example, school accountability metrics may be published online, and packaged in ways that are intended to be easily accessed and consumed by laypersons, especially those in traditionally disadvantaged groups. However, these are not the primary sources of information for many parents. Major problems lie in parents’ information pathways and social networks, which are biased based on race and class in ways that privilege advantaged families.

Parents rely heavily on assumptions and stereotypes about schools that are biased according to patterns of educational inequality. For example, schools with higher proportions of black, Latinx, and poor students are often labeled as needing improvement under federal and state laws (Zhang & Cowen, 2009). In addition, the achievement gap at the heart of school reform goals highlights and reinforces the message that white and non-poor students consistently graduate from high school at higher rates than black, Latinx, and poor students, and perform at higher levels on standardized tests (Kena, et al., 2015). All of this perpetuates the stereotype that whiter and wealthier schools are of higher quality. Several
studies have found that white, middle- and upper-middle-class parents deduce school quality based on assumptions about race and class composition, and location (i.e., the demographic patterns of school neighborhoods), not on academic performance data (Holme, 2002; Roda & Wells, 2013; Smrekar & Honey, 2015). These findings illustrate goal ambiguity and conflict, as outlined above, but also contradict the assumption that parents intentionally seek accurate information with which to make decisions about schools.

In addition, information about schools flows through parent social networks that are biased based on race and class (Phillippo & Griffin, 2016; Schneider, Teske, Roch, & Marschall, 1997; Villavicencio, 2013). For example, Bell (2007, 2009a, 2009b) studied parents’ school “choice sets,” which are the groups of schools from which they make their decisions as opposed to the entire set of schools available to them. She found that these choice sets are constrained by parent access to social, economic, and cultural capital that are determined by stratified social contexts and geographies. Within stratified social networks, families have different levels and types of access to ground-level knowledge about admissions procedures and schools (e.g., personal access to a principal) in patterns that privilege advantaged groups (André-Bechely, 2005; Ball & Vincent, 1998; Holme, 2002; Roberts & Lakes, 2016; Schneider, et al., 1997). Even when school information is regulated, parents continue to rely on socially-constructed and interpreted information that differs markedly based on race and class, and is significantly influenced by stereotypes about race and class. This does not conform to the rational decision-making requirement of complete and accurate information.

**Participation barriers.** The primary assumption about school choice markets is that students can enroll in and attend the schools they choose, yet having an opportunity to apply to and be accepted in a higher quality school is not the same as having the ability to attend a
higher quality school. Students’ lack of access to schools of choice are often attributed to policy failures, and attempts are made to remedy these through new regulations. Transportation and commute time are common barriers to school choice participation, especially for economically disadvantaged families, and those who live in areas farther from quality schools of choice (Hammond & Dennison, 1995; Witte & Thorne, 1996). For example, André-Bechely (2005, 2007) found that in Los Angeles, poor, immigrant, black, and Latinx families’ lack of transportation and lack of proximity to high-performing schools manifested in barriers to choice options for many students who were then compelled to stay in underperforming schools closer to their residencies. This situation is sometimes addressed by increased provision of free public school transportation, but also often prompts calls for new charter schools to fill in these types of quality gaps in school markets, which then increases competitive pressure on existing schools.

Other policy barriers include selective admissions processes in public as well as private schools that tend to privilege white and wealthier students, and exclude poor students of color (Lauen, 2007; Quiroz & Lindsay, 2015; Witte & Thorne, 1996). For example, selective processes could occur at an élite urban public high school through an admissions test, or an arts-based magnet school with an audition process, or a private school that accepts vouchers, yet maintains other admissions requirements. Complex school enrollment systems also act as barriers for poor families, as they tend to be less able to navigate and potentially manipulate them than wealthier families (Apestiguia & Ballester, 2012; Knoester, 2011). These types of barriers are directly related to social structures of relative advantage and disadvantage based on race and class.
Summary of Research Findings

The combination of defining school quality by aggregate academic measures, and increasing competition among them was intended to motivate schools to improve their capacity to increase student academic achievement and attainment based on rational assumptions that have proved problematic. First of all, defining a school or district’s quality based on the aggregate performance of a shifting group of enrolled students creates an ambiguous goal for school organizations in that they could focus improvement efforts on improving existing students’ scores, or on changing the students. In addition, there is goal conflict because parents choose schools based on many other attributes than academic performance metrics. Secondly, the information parents need to make rational decisions about school enrollment is incomplete, biased, and manipulated. Finally, some families are unable to participate fully in school choice systems, or participate only within a small fraction of the market. Perhaps as a result of the absence of adequate conditions for rational decision-making and full participation, widespread improvements to student and school performance predicted by market-based reforms have not come to pass.

Local School Governance in Education Reforms

Public school organizations in the U.S. are locally governed by school boards that are nominally assumed to drive large-scale reforms such as those sought by increasing competition, yet their influence has been increasingly curtailed (Diem, Frankenberg, & Cleary, 2015; Kogan, Lavertu, & Peskowitz, 2016; McGrath, 2015; Tracy, 2007). In fact, Kirst (1994) describes school boards as the “biggest loser” in policy influence in the latter half of the twentieth century (p. 380). They have been subject to top-down changes that shifted control of public education to states through federal regulation such as the standards-
based movement of the 1980s, and the accountability movement of the 1990s (Diem, et al., 2015; Kirst, 1994; McGrath, 2015).

Local school boards are subject to the federal government’s increasing tendency to use accountability performance measures to ensure that state and local governments comply with national policy goals, and are not able to prioritize conflicting objectives (Kogan, et al., 2016). In terms of school competition, state governments mediate school districts’ potential responses by setting the “rules of the game” around school choice, student enrollment, funding formulas, and so forth (Jabbar, 2016a, p. 2). The end result is that school boards are primarily translators and implementers of federal and state mandates (Rallis & Criscoe, 1993). They are also constrained from the bottom up by teachers’ unions (Kirst, 1994). This calls into question the assumption that local school boards have autonomy to make decisions they think are best based on their local populations and stakeholders in order to compete successfully in school markets.

In addition to being responsible to higher levels of government, and interest groups such as unions, school boards are also accountable to their local communities. In the early days of U.S. public education, school boards were typically elected on a ward representation system, which encouraged members to cater to the interests of hyper-local communities, and led to favoritism and cronyism (Kirst, 1994; McGrath, 2015). In the early part of the twentieth century, there was a shift toward electing nonpartisan, centralized, at-large school board members in order to address corruption, special interests, and inefficiencies (Kirst, 1994; McGrath, 2015). In the early part of the twentieth century, there was a shift toward electing nonpartisan, centralized, at-large school board members in order to address corruption, special interests, and inefficiencies (Kirst, 1994; McGrath, 2015). In the early part of the twentieth century, there was a shift toward electing nonpartisan, centralized, at-large school board members in order to address corruption, special interests, and inefficiencies (Kirst, 1994; McGrath, 2015). In the early part of the twentieth century, there was a shift toward electing nonpartisan, centralized, at-large school board members in order to address corruption, special interests, and inefficiencies (Kirst, 1994; McGrath, 2015). Today, the vast majority of school boards are populated by at-large, elected, volunteer laypeople who risk not being reelected if they act in opposition to their constituents’ wishes (Diem, et al., 2015; Tracy, 2007). While members are democratically elected, they are often not representative of their communities. Very few school board
elections are competitive, candidates tend to be relatively unknown, and voter turnout is typically low (Hess, 2002; Rallis & Criscoe, 1993). School board membership is whiter, wealthier, more educated, and more male than the general population (Hess, 2002), which can result in school board decisions that do not understand the needs and preferences of families with different demographic characteristics.

According to the National School Boards Association’s *Key Work of School Boards* Guidebook, school boards are responsible for five areas of governance: vision, accountability, policy, community leadership, and board/superintendent relationships (Bohley, 2016). School boards set key organizational values, the top one of which is supposed to be student achievement, and they are accountable to meet accountability benchmarks set by their authorizer. As a political body, they are responsible to engage in legislator advocacy and local community engagement. They set and administer macro policies, and are responsible to oversee administrative policy and implementation through the superintendent, whom they hire and supervise. This generally results in the superintendent being the sole educational professional in the group, and the school board’s primary source of information, which gives this person extraordinary ability to frame problems, recommend solutions, and thus dominate any policymaking that occurs (Rallis & Criscoe, 1993). The combination of being held accountable to the conflicting goals of government and community, reliance on others’ professional expertise, and limited sources of information makes it likely that school board decision-making does not follow rational processes.

School boards engage in a wide range of government functions. They serve a *legislative* role by adopting budgets and setting policies, an *executive* role by implementing policies, overseeing spending and contracting, hiring certain positions, and negotiating union contracts, and a *judicial* role as final arbiter of policy violations, and in student disciplinary
hearings (Kirst, 1994). While student achievement is intended to be the top priority, school boards are ultimately responsible to taxpayers who fund local schools and elect them (Diem, et al., 2015; Rallis & Criscoe, 1993). Hess (2002) confirmed this tension when he found that most school board members cite student achievement and funding as their top concerns. The scope of school board responsibilities, in tandem with the narrow range of decisions over which they actually have control, as well as likely conflicts between government requirements and community preferences, highlights the strong possibility that the system does not support school boards to be efficient drivers of organizational change.

**A Biased Perspective in the Literature on School Markets**

Instead of dramatic and widespread school improvements, competition among schools has had mixed, generally unremarkable results with regard to student outcomes (Kena, et al., 2015). The typical response in the literature is to rationalize why market-based competition has not yet worked. March (2006) articulates this point when he writes,

> To some extent, the poor record of rational technologies in complex situations has been obscured by conventional gambits of argumentation and interpretation. The failures have been pictured as stemming not from the technologies but from some features of misguided use of them. It is sometimes claimed that the schemes generated by such technologies are good ones but have been frustrated by implementation problems, or by the perversities or incompetence of individuals involved in bringing them to fruition. It is sometimes claimed that although the rhetoric justifying a particular action is explicitly rational, a rational technology has actually been used only as a justificatory vocabulary not as a basis, thus did not produce the disaster. It is sometimes claimed that although the record is poor, it is at least as good as alternative technologies for dealing with complex situations (p. 208).

Explanations about what March calls in the above quote “misguided use” of market principles, and policy fixes that are intended to solve “implementation problems” regarding market-based school reform efforts abound in the news as well as the literature (e.g., Henig, 2013; Labarce, 2010; Orfield & Frankenberg, 2013). Many have argued that government regulation has not allowed a pure market based on voluntary exchanges between
autonomous families and schools to form (e.g., Whitty & Power, 2000), and has in effect been used as “justificatory vocabulary” (March, 2006, p. 208). Going backwards to a system of less choice is also not a politically appealing option.

The literature is clear about some of the core problems with market-based school competition. As explained earlier, goal ambiguity and conflict; inaccurate, incomplete, and manipulated information; and participation barriers prevent schools and families from engaging in the rational decision-making processes necessary to make the market system work as intended. Typically, these dilemmas are pointed out as evidence that rational decision-making is not occurring as planned (Lubienski, 2005; Phillippo & Griffin, 2016; Villavicencio, 2013). In fact, claims of rationality are likely being used by groups in power to maintain the status quo by avoiding discussing pervasive social issues. For example, Frankenberg and Kotok (2013) claim that political discussions about racial equity in suburban school districts require a “race-neutral, rational sounding discourse” in order to be accepted and acted upon (p. 124), which prevents explicit discussion or action about race. Lyken-Segosebe and Hinz (2015) explored the ways in which rational choice theories are used as a political tool by middle-class parents in their efforts toward educational “opportunity hoarding.” In all of my searching, I found one example of a researcher, Ben-Porath (2009), who questioned basic assumptions of rational decision-making in school markets altogether by citing research that she interprets as evidence that parents satisfice in their school choices by making emotional and intuitive decisions about where to enroll their children.

Perhaps the reality is that a market-based system based on the assumption of rationally-decided exchanges between autonomous organizations and individuals is not possible because it fails to represent the social and political complexity of public education.
No policy fixes will change the fact that schools operate in communities, and will always involve the elements of what Stone (2001) refers to as the *polis*: tension between cooperation and competition; social influences; ambiguous, interpreted, incomplete, and manipulated information; loyalty; passion; alliances; and power dynamics. While it is widely acknowledged that some amount of social interpretation and politics infiltrates market systems in the real world, there is a gap in the literature on school choice and competitive school markets with regard to alternative perspectives on organizational behavior that take into account social and political factors.

Stone (2001) argues that all policy involves politics, which situates all but the simplest market exchanges in communities, yet the dominance of technical rationality, and ideologies of rationality in western society constrain our ability to question the assumption that rational decision-making is what people and organizations do (Burawoy, 1998; March, 2006; Schön, 1983). This applies to any major education reform over the history of the United States, including the current reform movements outlined above that are based on the assumption that schools will strive to become more efficient and effective at meeting externally-set benchmarks in order to avoid being shut down or taken over. A different decision-making model is necessary to examine how complex school organizations function within their policy environments. I propose such a conceptual framework in the following section.

**Conceptual Framework**

Organizational theorists have long questioned the assumption of “economic man” and taken-for-granted rationality beginning with March and Simon’s (1958) ideas about bounded rationality that highlighted limitations to rational decision-making in complex organizations. These ideas are studied in business schools, yet ideologies of rationality persist, and continue to inform social policy such as the education reform strategies explored
in the prior section. In response to the dominance of ideologies of rationality, critics started to recognize that common organizational characteristics such as causal complexity, uncertainty, strategic interactions between individuals and organizations, and value conflict do not fit the rational decision-making model (March, 2006; Schön, 1983).

In this section, I present an alternate perspective that is focused on theories in the field known as New Institutionalism that consider how institutional fields influence the decisions organizations make. Specifically, I consider the concept of institutional isomorphism that explains how regulative and socio-political pressures steer organizational behavior by influencing what is considered legitimate, and pressuring organizations to develop outward-facing appearances of legitimacy (DiMaggio & Powell, 1983; Meyer & Rowan, 1977). I connect this idea to the concept of brand in order to explore its effects within the current market-based school enrollment policy environment.

To examine the decision-making processes of my chosen case, I use Cohen, March, and Olsen’s (1972) garbage can model, which is situated within the new institutionalist framework. This model challenges the prevailing view by claiming that organizational decisions are generated within systems that are influenced more by power dynamics, interpretation, and happenstance than any sort of rational process. To tie these ideas together, I use a systems thinking framework developed by Williams and Hummelbrunner (2011). I end this section with an exploration of how power dynamics affect activity within decision-making arenas.

**New Institutionalism**

Despite appearing to lack the conditions for rationality, organizations continue to make decisions and maintain viability (March, 2006). Instead of viewing outcomes that do not adhere to rational predictions as pathological, organizational theorists began to develop
feedback-based, adaptive models of organizational behavior (Cyert & March, 1963). Augier and March (2008) describe this development as a recognition that organizations intend to behave rationally, but are bounded by human and institutional limitations, and are populated by groups that have conflicting interests, which makes rational decision-making impossible due to goal ambiguity. In their influential book *A Behavioral Theory of the Firm*, Cyert and March (1963) proposed that organizations operate more through routines and standard operating procedures than through rational decision-making processes. Their theory is based on three basic ideas: bounded rationality, imperfect environmental matching (i.e., rules and practices are not determined solely by demands), and unresolved conflict (Augier & March, 2008).

Based on these early ideas, theoretical perspectives on organizational behavior began to emerge in the 1970s that recognized social and political pressures within environments that influenced organizational decisions, and eventually became known as New Institutionalism (Powell, 2007; Scott, 2008). New institutional theorists explore how organizational decisions are shaped by the social and political effects of institutional fields versus the rational processes of individuals (DiMaggio & Powell, 1983; March & Olsen, 1984; Powell, 2007). The basic concept is that organizational structures do not exist merely to meet technical demands and obtain resources, they also reflect the “rational myths” of their institutional field, which are defined by rule-based frameworks and the law, societal expectations, and knowledge legitimated through relevant professions (Meyer & Rowan, 1977; Powell, 2007).

Use of the word myth underscores the powerful idea that society creates symbols of legitimacy. Ideologies and technologies of rationality are currently what are perceived as legitimate in western society. Cabantous and Gond (2011) use the term “performative
praxis” to describe how organizations manufacture rationality by reframing and justifying decision-making processes that are extremely complex through a rational lens, thus cultivating symbols of legitimacy. Aside from this overarching expectation that viable organizations behave rationally, the institution of public education has generated its own symbols of legitimacy—such as the core academic disciplines of literacy and numeracy—and these symbols act as shared expectations across the institutional field.

Institutional isomorphism. Within New Institutionalism, DiMaggio and Powell (1983) helped to shape the theory of institutional isomorphism raised by earlier theorists (e.g., Meyer & Rowan, 1977), which describes the tendency for organizations that share space and resources in a field to become more similar by attempting to meet shared expectations. They posit that an organization experiences isomorphic pressures from its institutional field to cultivate structures that are perceived as legitimate, thus aligning with the rational myths of their field. Organizations engage in this work by aligning their structures with laws and public opinion, incorporating seemingly successful structures being used by others in their field, and adhering to established professional norms and knowledge bases.

Governments and cultural expectations exert what DiMaggio and Powell (1983) term coercive isomorphic pressures. For public schools, these are forces such as state accountability requirements, standard operating procedures, and parental expectations about the types of academic and non-academic offerings that are available. Mimetic pressures encourage schools to copy successful structures from elsewhere in the field, such as what nearby high-performing schools appear to be doing, which helps them to respond effectively to uncertainty. Normative pressures stem from the profession of education, such as popular
“best practices,” and steer schools toward certain curricular and classroom management approaches.

Institutional isomorphism explains why schools across the U.S. appear to be more similar than not. DiMaggio and Powell’s (1983) primary argument is that these formal structures are not intended to increase efficiency or technological performance in an organization, but to promote success in the institutional field by appearing to function as expected. W. R. Scott added his own categorizations by theorizing that institutional fields are structured around regulative, normative, and cultural/cognitive elements that rationalize legitimacy and provide order based on the law and policies, morality or a sense of obligation, and culture (Scott, 2008).

As the new institutional perspective strengthened, researchers clarified the idea that organizational fields can be localized, fragmented, and conflicting despite overarching societal influences, and that organizations are in relationships with each other within a field (Scott, 2008). In a competitive school enrollment setting, schools that share geographic space, and/or potential students would experience similar isomorphic pressures because they share a local institutional field, while also being subject to wider state, national, and even global institutional pressures. This latter element is especially relevant in public education, as the concerns of large urban school districts, which comprise less than two percent of all public school districts, are portrayed in the media as national crises and thus become the focus of federal and state policies (Hess, 2002). The institution of public education is therefore biased toward the conditions and challenges of urban settings. When state education policies are developed in capital cities with an eye toward solving urban problems, and with a knowledge base biased toward these types of settings, institutional pressures can be misaligned with the unique challenges of rural schooling such as economic depression,
aging populations, and declining student enrollment (Patterson, Koenigs, Mohn, & Rasmussen, 2005). This is in evidence in the literature explored earlier, which is heavily focused on urban schooling.

School boards are a prime example of a formal organizational structure that serves a symbolic institutional purpose. Rallis and Criscoe (1993) explain that as the legally designated governance body, school board meetings are perceived as the site of “real” decision-making in the organization; however, they claim that these convenings are public performances that serve as rituals of legitimation while most decisions that affect teaching and learning occur behind the scenes. They describe school board meetings as sites to air grievances, promote solutions, publicly align oneself with one side or another, or engage in community voyeurism. School board meetings are formal structures that provide symbolic opportunities for community voice, which preserves the appearance of legitimate democratic processes while maintaining the status quo as those in positions of power make decisions that are aligned with their perspectives and interests.

Despite the fact that the most common type of school board are those in suburban and rural school districts, most research on school boards occurs in large urban and metropolitan areas (Kirst, 1994). Rural school boards whose members adopt institutionally legitimate responses to problems (i.e., they follow norms dominant in urban and professional settings), but violate community norms or preferences in the school district’s rural, working class setting, can inadvertently exacerbate conflict in their communities (Patterson, et al., 2005). In addition, because school boards tend to be composed of members that are wealthier and more highly educated than the general population (Hess, 2002), and their meetings include the superintendent and other district administrators who report on
administrative topics (Kirst, 1994), these groups may be more aligned to institutional norms than the communities they serve. This can result in political conflict.

For example, McHenry-Sorber (2014) found that class divisions in a rural community revealed tensions around the purpose of schooling (e.g., preparation for work versus preparation for college), and what a professional teacher’s salary should be in comparison to the average earnings of working class residents. A college preparation focus in school and professional-level teacher salaries are norms in the institution of public education, but violate norms in some blue-collar communities. In this study, McHenry-Sorber witnessed opposing groups use school board meetings as a forum through which to promote their separate narratives and to disparage the other side.

In another study, Williams (2013) considered the micropolitics of a rural school board’s decision to consolidate schools in ways that revealed power hierarchies based on race and class, and increased existing inequities in educational opportunity for district students. Contentious consolidation decisions can lead to out-migration, which exacerbates the population loss that led to the situation in the first place, and worsens educational prospects for students who are not able to leave (Bard, Gardner, & Wieland, 2006). Perhaps to compensate for this urban-rural institutional mismatch, school boards of small districts are heavily influenced by local reference groups in terms of policy adoption (Rincke, 2006), which implies that they are sensitive to mimetic institutional pressure (DiMaggio & Powell, 1983). These urban-rural institutional dynamics are highly relevant in the context of the rural school district at the center of my research.

**Rational myths and branding.** Isomorphism is related to the marketing concept of brand in that organizations in a field (or market) are pressured to adhere to socially-constructed symbols of legitimacy and appeal in order to survive. An interesting component
of the policy shift to increased school choice and competition is the way in which the rational myths of public education and school markets interact and are in tension with one another. School organizations are subject to institutional pressures that shape people’s expectations about what schools offer, how they are organized, and how they behave, and those that appear to conform to these expectations stand a better chance at survival (Davies & Quirke, 2007).

With the shift toward increased competition among schools, school organizations have been increasingly subject to forces within their local marketplaces that arise from the requirement to attract and retain students. In addition to appearing institutionally legitimate, they also need to be appealing to parents and students in their marketplace. In a market setting, this outward-facing appearance is an organization’s brand. While attributes of institutional legitimacy and consumer appeal often overlap, these pressures can conflict. For example, institutional pressures to maintain high standardized test scores may conflict with groups of parents who eschew academic programs based on test preparation. For schools in competitive environments, organizational decisions are influenced by a combination of simultaneous pressures from the institution of public education, and the needs and preferences of potential students and their parents.

The concept of brand varies in the marketing literature (Stern, 2006). Due to the social and political aspects of public education, I draw from theories that conceptualize brand in a metaphorical sense as the full set of stakeholders’ mental associations, symbols, identity markers, and enduring characteristics of the organization or product, which can differ depending on one’s perspective (Stern, 2006). Pike (2013) categorizes the elements of a brand as: associations (e.g., people, places, historical events), identities (e.g., approach, theme, programs), origins (e.g., history, school type), qualities (e.g., performance, safety,
convenience), and values (e.g., reliability, community-oriented, high expectations). Brands are co-constructed by multiple internal and external organizational stakeholders in a dynamic and nonlinear process (Hatch & Schultz, 2010; Schroeder, 2009). This is especially true for an organization such as a school that is defined to a large extent by the individuals in it, and the community that surrounds it. The literature reviewed above supports the idea that parents make assumptions about schools based on brand elements that include student body composition, location, type (i.e., charter, magnet, private), and performance metrics.

In business terms, schools exist in branded markets as opposed to commodities markets because their value is difficult to discern, and thus rely on information provided by others (Lubienski, 2007; Pike, 2013). Lubienski (2007) identifies three basic categories of goods: search goods have qualities that are easily accessed by consumers prior to purchase, experience goods have qualities that can only be realistically judged after consumption, and credence goods have qualities that might never be able to be assessed by the consumer, and rely on trust in the producer to deliver as expected. The market-based school enrollment model’s reliance on standardized data to indicate school performance implies that schools should be considered search goods; however, due to the difficulty in assessing school value prior to enrolling, and because long-term schooling outcomes for individuals may or may not become apparent, schools are considered experience as well as credence goods. In a competitive market, this makes a school organization’s brand a key determinant of its success.

School brands have always existed, but were not necessarily conceptualized as such. Institutional and market pressures to conform to specific expectations existed for public schools prior to market-based reforms, as they were subject to government policies as well as some level of competition based on family residential mobility and the existence of private
schools (Hoxby, 2000). In this context, schools were being judged by a variety of stakeholders and thus developed reputations, whether or not they consciously acknowledged these reputations as brands, or engaged in specific marketing strategies to shape them. For example, high standardized test scores tend to be interpreted as a symbol of school quality in the current outcomes-based accountability system. Schools that face competition are not only incentivized to generate high aggregate student test scores to meet legal requirements, they are also incentivized to do so to cultivate a brand that conveys the idea of quality education that is appealing to parents who have a range of options.

The key idea is that the symbol is of primary importance, not student learning per se. Schools are perceived to have a quality program whether their excellent test scores result from high enrollment percentages of traditionally high-performing students, or effective teaching and learning programs for traditionally low-performing students. This could explain why some schools respond to competition by “creaming” or “cropping,” strategically shaping their programs around target audiences of traditionally high-performing students, or locating their schools near more advantaged neighborhoods as outlined in the literature reviewed earlier.

The theoretical connection between institutional isomorphism and brand appears in the literature on public organizations and management (e.g., Glynn & Abzug, 2002; Rahman, 2014). Fay and Zavatarro (2016) provide a rare application to the field of public education in their study of the recent tendency for higher education organizations to allocate significant resources to branding and marketing initiatives. They hypothesized that organizations would adopt and design these initiatives based on mimetic isomorphic pressures that led them to look to aspirational organizations within national institutional fields, yet found that they were more likely to adopt initiatives based on coercive pressures within their own states. In this
case, the isomorphic tendencies under investigation were the addition of branding structures themselves as well as the images cultivated. This mirrors findings in the K-12 school choice literature that the addition of marketing is one innovation that has been documented as an outcome of increased competition among schools versus the intended innovations in teaching and learning (Lubienski, 2006).

**Systems Thinking and Loose Coupling**

To add clarity, focus, and structure to the study of complex school organizations in even more complex institutional fields, I draw from a framework developed by Williams and Hummelbrunner (2011) that defines a system as boundaries, elements, and links. The boundaries of the decision-making arena must be intentionally defined in order to limit complexity and allow focused analysis. In thinking systemically, the authors suggest considering why elements are inside or outside the boundary, how elements interrelate while in there, and with what consequence. They remind us that how one sees, interprets, and makes sense of a system and its parts depends on one’s perspective, and it is important to analyze it from the perspective of different participants, as well as external observers and organizational stakeholders. This systems thinking framework is well-aligned to Cohen, March, and Olsen’s (1972) garbage can model of organizational decision-making, which I use to analyze decision-making in my selected case, and describe in detail below.

A key concept in new institutionalism is loose coupling, which describes how elements in a system can be connected in such a way that they retain their inherent separateness despite being interconnected. Weick (1976) claimed that school organizations were classic examples of loosely-coupled systems characterized by a level of tacitness and impermanence that results in uncertainty in an organization’s structure, yet also facilitates flexibility and adaptation, and minimizes disruption. For example, if a section of an
organization experiences disruption, either from an external source, or through internal conflict with another section, loose coupling isolates the disruption by minimizing the extent to which the section affects the rest of the organization. Conflicting sections within an organization can also disconnect, which does not resolve the conflict, but prevents it from expanding or being noticed as much. This protective device helps to maintain organizational functioning and viability.

Meyer and Rowan (1977) theorized that when institutional legitimacy is in conflict with the day-to-day demands of an organization’s work—as often occurs in complex, socio-political organizations such as schools—formal structures become largely symbolic and loosely-coupled to their technical work. They defined formal organizational structures as the rationally-derived goals and policies that outline work activities and expected outcomes, and claimed that these are incompatible with complexity, ambiguity, and competing interests that are ubiquitous in organizational life. They claimed that by cultivating rituals of good faith by creating expected structures related to the rational myths of their institution, organizations can avoid close inspection and evaluation. Loose coupling allows organizations to manage conflict between internal technical demands and external legitimacy demands by allowing formal structures and internal operations to function separately despite being interdependent. In other words, a symbolic shell that aligns with institutional expectations projects legitimacy and ensures survival while the technical work continues as usual, potentially in stark contrast to this image. Over-rationalization and obvious myth-making within an organization are clues that loose coupling is occurring (Weick, 1976).

Meyer, Scott, and Deal (1980) applied these ideas to the institution of schooling. They confirmed that schools are institutional organizations that are tightly-coupled to their environments, as opposed to technical organizations that focus on their internal work.
Schools, they claim, put a lot of effort into maintaining their legitimacy by adopting symbols such as accreditation credentials, and pay less attention to their core technology than one might assume. In other words, the general assumption is that if it has the trappings of a successful school, then it’s a successful school. They made the prescient statement, considering the current market-based system, that a school’s survival relies more on keeping its constituents and participants satisfied and maintaining its reputation than on its success in teaching and learning. This calculus has changed somewhat in the current age of standardized testing, yet one can claim that test scores are now simply another symbol upon which to base legitimacy.

**The Garbage Can Model of Organizational Decision-making**

Within new institutionalism, Cohen, et al. (1972) developed the garbage can model based on theories from the fields of sociology and political science. They claim that “organized anarchies”—characterized by ambiguous goals, unclear technologies, and fluid participation—engage in “garbage can” processes in which independent streams of problems, solutions, participants, and choice opportunities flow into decision-making arenas where they interact with each other and generate decisions (see Figure 2A). They claim that schools are prime examples of organized anarchies in which these garbage can processes occur, and this claim is backed by evidence in the literature reviewed above.
Cohen, et al. (1972) describe the garbage can model as “a collection of choices looking for problems, issues and feelings looking for decision situations in which they might be aired, solutions looking for issues to which they might be the answer, and decision makers looking for work” (p. 2). According to the model, loose coupling in the system means that problems, solutions, participants, and choices exist independently, and retain their separateness when linked together (Weick, 1976). In a garbage can system, solutions are not generated by a process of considering options. Participants may be attached to the same problem for a long time, or quickly move from one to another. The ability to create a choice opportunity indicates power. Decisions may not solve problems. This model challenges most taken-for-granted assumptions about how organizations make decisions.

Cohen, et al. (1972) highlight timing as an important factor in that interactions among elements depend on when and at what rates they enter and exit the system. It matters when a participant is paying attention, and to what. It matters whether or not a solution and a choice opportunity can connect. It matters how many and what type of problems are in the...
system at the same time. Considering temporal order in a decision-making system provides an alternate perspective to the rational ordering of means-ends, cause-effect, or intention-action that typically underlie decision-making theories (March & Olsen, 1984).

Another contrast to rational processes is that solutions exist independently in the system, and may become attached to problems for any number of reasons, but not necessarily due to a rationally-derived response (although this is possible). A solution may not even solve a problem; however, based on a societal bias toward assumptions and expectations of rationality, organizational stakeholders tend to rationalize decisions after the fact by emphasizing and/or reinterpreting aspects of the process that make it seem more linear and intentional (Cohen, et al., 1972). Cohen, et al. (1972) write, “Measured against a conventional normative model of rational choice, the garbage can process does appear pathological, but such standards are not really appropriate. The process occurs precisely when the preconditions of more normal rational models are not met” (p. 16).

According to the model, decisions are generated by one of three processes: resolution, oversight, or flight. Resolution is the typical, assumed rational decision-making process whereby problems are resolved after a period of working on them by considering a range of options and choosing one. Oversight means that a choice is made quickly before any problems are attached to it. Flight implies that a choice is made after any attached problems leave it. Neither oversight nor flight resolve problems, yet all decisions are rationalized as if they have. The meaning of a decision can change as new situations develop, or can be rationalized in different ways depending on one’s perspective. The authors fully admit that this process is not an efficient way to solve problems, but that it does keep organizations moving.
According to Cohen, et al. (1972), garbage can systems are sensitive to load, and increased load is correlated with increased proportions of decisions made by flight and oversight. Load can be generated in many ways. For example, decision-makers shift around between problems, solutions, and choice opportunities, and expend energy in the process. Problems can build up in the system if they enter more rapidly than they are resolved. This effect can be exacerbated by the presence of difficult problems that are slow to be resolved, or by mostly making decisions that solve no problems. Participants attached to certain solutions may cause others to expend significant energy looking for a problem that it can solve. According to the model, increases in system load lead to decreases in rational decision-making and fewer problems solved.

Increasing competitive and accountability pressures on a school organization increases load on the system. The standards-based accountability movement added coercive institutional pressure to this system, and the school choice movement added competitive pressure to this system. Both of these reform movements were intended to raise student achievement and improve schools. However, the additional load and complexity may amplify organizational tendencies to create symbolic formal structures that meet expectations, but are increasingly disconnected from the day-to-day work to meet student needs (Meyer & Rowan, 1977), or increase the likelihood that decisions are made quickly without any semblance of rational process (Cohen, et al., 1972). This aspect of the model calls into question the assumption that increases in competitive market pressure and accountability will automatically prompt increased organizational efficiency and productivity.

The garbage can model contradicts dominant ideas about rationality that form the foundation of free market models. Decades after publishing it, Cohen, March, and Olsen (2012) reflected back on a key idea they attempted to convey, which is that the world is not
chaotic, but merely appears chaotic because the rational decision-making model does not apply to real-life systems governed by timing, and not intentions. They noted three categories of response to the garbage can model that they had encountered over the years. One response is insight and recognition of the messiness of organizational operations perceived in real life. Another recognizes these insights and wonders how to harness them to shape organizational behavior to specific advantages. The third and most prevalent response recognizes these insights and their potential, yet wonders how to use them to restore order, clarity, and predictability. Once again, the authors found that messiness is perceived as unacceptable and pathological based on established norms of order and reason.

I used the garbage can model as an analytical tool to explore the decision-making processes of a school organization in a competitive environment because I would fall into the first response category. Due to my personal experience as a public school administrator, I instantly recognized Cohen, et al.’s (1972) concept of organized anarchies as well as the messiness and complexity of decision-making processes within them. Not only do schools not meet the requirements for rational decision-making as distinct organizations, they are situated within the institution of public education that could also be described as anarchic based on the attributes of ambiguous goals, unclear technologies, and fluid participation.

**Power Dynamics in Decision-making Arenas**

Salancik and Pfeffer (1996) describe power as “the ability to get things done the way [one wants] them to be done” (p. 413). In garbage can systems, power influences the entry/exit of specific elements, directs participant attention, and generally affects how elements interrelate. In institutional fields, dominant values, myths, and rules establish bias, and thus enable or constrain the exercise of power (Bachrach & Baratz, 1962). Cohen, et al. (1972) note that problems in garbage can systems that are important to decision-makers are
more likely to be solved than those they consider unimportant, and decisions important to
decision-makers are less likely to solve problems than those they perceive as unimportant.

In an organization, there are significant differences between routine and key
decisions (Bachrach & Baratz, 1962). Routine decisions are made by tacitly applying standard
operating procedures as opposed to engaging in a rational process (Cohen, et al., 1972; Cyert
& March, 1963). They profoundly affect students’ educational experiences, and stakeholders’
understanding of “business as usual” despite being relatively unnoticed. On the other hand,
key decisions spur community voice in school governance. Tracy (2007) refers to this as
“discourse of crisis” that reveals conflicts between institutional and community norms, as
well as power hierarchies within the system. Bachrach and Baratz (1962) remind us that
exercising power not to recognize choice opportunities, or not to make decisions can be
effective ways of maintaining the status quo. Similarly, Tyack (1991) describes silence as a
political tool, and states that evidence of power exists in what is and is not being talked
about, which can affect participant attention.

To consider power dynamics between individuals and groups, I draw from French
and Raven’s (1959) five bases of social power framework. It describes relationships between
recipient(s) of attempts to use power, and the person(s) wielding the power that include:
reward power (perceived ability to provide rewards), coercive power (perceived ability to enact
punishment), legitimate power (perceived legitimacy to control one’s behavior based on social
and institutional norms), referent power (identification with and attraction toward the other
party), and expert power (perceived possession of relevant, special knowledge). For example,
the superintendent is typically perceived by school board members to possess relevant
professional knowledge and expertise, and therefore wields significant expert power in that
group. This power is heightened if school board members also personally like and identify
with the superintendent, and confer referent power. This framework allows examination of
dyadic links between participants within the decision-making system, and how power shapes
their interpretations and behavior.

I also consider sources of organizational power that affect how elements interrelate
in the system. For example, individuals and subunits of organizations with low levels of
positional authority can gain the ability to control resources by working on what Salancik
and Pfeffer (1996) call “critical problems,” which then allows them to frame other problems,
direct attention, and create choice opportunities, thus affecting organizational decisions in a
self-reinforcing cycle. An engaged parent volunteer may thus become an influential
participant in a school organization. This idea is reinforced by Mechanic’s (1996) assertion
that influence is related to access to “persons, information, and instrumentalities” in an
organization (p. 406). The parent in the prior example gains access to these things through
volunteer work. An administrative assistant in a school’s main office is often a key decision-
influencer due to these types of access despite low positional authority. Mechanic (1996) also
defined displaying effort and interest as a way to influence decision-making when and if
opportunities arise, or situating oneself in locations or positions that afford decision-making
access. Cohen, et al. (1972) assert that the structure of participant access to choice
opportunities affects the system, and power dynamics affect this access.

Identifying an organization’s target audiences is another way to reveal power.
Institutionally, target audiences are those that have the power to create policies, enact
sanctions, or endorse professional norms. For example, a school district’s authorizer would
be considered a target audience based on its authority in these areas. In a market setting,
target audiences are perceived as being able to provide rewards in terms of value exchanges,
or punish by denying or blocking these exchanges. Target audiences are revealed directly
through explicit decisions that meet the expectations or demands of certain individuals or groups, as well as indirectly by examining who benefits from decisions. For example, if a school board decides to focus on college preparation curriculum despite strong community requests to offer more vocational programs, this reveals alignment with current institutional norms in public education, as well as the preferences of more highly educated parents. It could also reveal assumptions among decision-makers that the families wanting vocational education do not pose a threat to organizational viability.

**Chapter Summary**

This chapter provided an overview of the problematic aspects of assumptions of rationality in the current high-accountability/high-competition schooling system, and suggested a conceptual framework for analysis that assumes social and political pressures, and timing affect decision-making in complex organizations. The current public school policy environment in the U.S. is based on an assumed singular goal of student academic achievement and attainment. Instead, research has shown that parents make school choice decisions based on a wide range of overlapping and competing priorities that include academic quality, but also include proximity, safety, and the race and class attributes of school populations. In addition, information about schools is incomplete, potentially inaccurate or manipulated, and socially constructed within parent/family social networks that are segregated by race and class. The range of viable school choice options available to students are further constrained by physical barriers such as transportation, but also curtailed by these social networks that can remove schools altogether from consideration. In addition to these problematic aspects of the market model, school organizations behave as “organized anarchies” in which social and political processes steer decisions to a far greater extent than rational, deliberative processes.
Education reform efforts that increased competition among schools applied a rational model under problematic assumptions that are revealed when one looks at the outcomes that these policies have produced. As such, the decision-making processes of school organizations in competitive market situations need to be analyzed using a model that matches their true characteristics. In Chapter 3, I describe how I analyzed the decision-making processes of a traditional public school organization in a high-accountability/high-competition setting using the conceptual framework described above.
CHAPTER 3

METHODOLOGY

Introduction

This research was intended to illustrate a traditional public school organizational decision-making system within a high-accountability/high-competition setting. The primary research question was, “What social and political dynamics were involved in a traditional public school district's organizational decision-making concerning its schools’ reputations and student learning over the course of one year?” Williams and Hummelbrunner (2011) recognize that analyzing complex socio-political systems can be overwhelming due to the “infinite relationships and purposes” within them, and the impossibility of describing it all from every imaginable perspective (p. 17). They recommend using a systems thinking framework to simplify complexity to a point at which productive analysis is possible, and their framework (outlined in Chapter 2) informed my approach to this study. The sub-questions that guided the design of this study were:

1. *What problems, solutions, participants, choice opportunities, and decisions appeared in GMRSD school committee meetings and materials between July 1, 2016 and June 30, 2017?*
   a. Who or what brought these elements into/out of the system, and when?
   b. Who framed and categorized these elements, assuming differing perspectives?
   c. Who made the decisions?

2. *How did these elements interrelate?*
   a. What connections/disconnections among elements occurred?
   b. How did participant attention affect these interrelations?
   c. What sources of power were employed, by whom, and for what purpose?
d. How were decisions made (i.e., deliberation, flight, or oversight)?

3. How did institutional and market pressures affect the decision-making system?
   a. What expectations and assumptions appeared in the system?
   b. How did stakeholders make sense of these expectations and assumptions?
   c. What groups were/were not target audiences, and why?
   d. What myth-making and strategic branding occurred, and why?

I begin this chapter by providing a rationale for my decision to use interpretive, qualitative methodologies, then describe my selected case, the Gill-Montague Regional School District (GMRSD) in detail, and my reasons for choosing it. I outline sampling strategies that start with a decision to bound the decision-making system within GMRSD school committee (i.e., school board) meetings during the 2016-17 school year. I describe data collection procedures that use ethnographic tools of interviews, observations, and artifact review. I discuss ethical considerations, as well as my positionality and ongoing reflexivity. Finally, I describe an iterative qualitative data analysis process based on the conceptual framework described in Chapter 2, and aligned to the research questions.

**Rationale for a Descriptive Case Study**

The market-based model of school competition is based on a theory of change that assumes school organizations engage in rational decision-making based on the specific goal of increasing all students’ achievement. This study was designed as a descriptive case study of a decision-making arena within a traditional public school district that is situated in a high-accountability/high-competition environment in order to investigate the decision-making processes of one local context. In his exploration of the value of case studies and of research as a learning process, Bent Flyvbjerg (2001) asserted, “In the study of human affairs, there exists only context-dependent knowledge” (p. 71). Analytic description is appropriate to
elucidate the social and political world by investigating complexity and local context in depth in order to describe, explore, and explain (Rossman & Rallis, 2012; Schaffer, 2016). In addition, considering local context is a key aspect of behavioral theories of organizational decision-making (March, 2006).

The purpose of qualitative research is not to test a hypothesis (e.g., whether or not competition improves schools), but to show how something works (Rossman & Rallis, 2012). Schön (1983) points out that often the importance of knowing how something works is important to those who experience it day-to-day when he writes,

> In the varied topography of professional practice, there is a high, hard ground where practitioners can make effective use of research-based theory and technique, and there is a swampy lowland where situations are confusing ‘messes’ incapable of technical solution. The difficulty is that the problems of the high ground, however great their technical interest, are often relatively unimportant to clients or to the larger society, while in the swamp are the problems of greatest human concern (p. 42).

Qualitative research methods are appropriate to capture and reflect the experiences of participants and practitioners in local contexts by seeking depth over breadth in support of learning (Creswell, 2014; Miles & Huberman, 1994; Rossman & Rallis, 2012). Schön’s (1983) allusion to “confusing ‘messes’” and unlikelihood of technical solutions in the above quote aligns perfectly with Cohen, et al.’s (1972) conception of organized anarchies. This research was intended to illustrate the day-to-day experiences of individuals in order to build understanding of the ground-level effects of education policy shifts.

Following Geertz (1973), I used an interpretivist approach in order to develop understanding of the multiple meanings participants make of this system. Burawoy (1998) refers to what he calls “reflexive science,” which he describes as a dialogue between researcher and participants, which is then embedded in a second dialogue between local processes and external forces, which is then embedded in a third dialogue with relevant
theories. It is this perspective and process that I attempted to embody by using qualitative methods.

Ethnographic methodologies are applicable to the study of actions and interactions of individuals and groups (Rossman & Rallis, 2012), yet it is important to recognize that ethnography is not identical to qualitative research (Yanow, 2009). This study drew from ethnographic methods in its efforts to use multiple means to collect information from within a field directly from members, events, and artifacts that exist therein; however, due to its focus on data collection primarily through artifacts and interviews, and less so through informal observation, the study design is not as immersive as should be expected from a true ethnography.

Research Setting and Case Description

I’m spending time on this beautiful fall day driving around my chosen research site, the Gill-Montague Regional School District. The Connecticut River is 100 feet below me on this long bridge that connects my town to the town of Montague. At the end of the bridge, I cross a narrow strip of land lined with a long row of contiguous mill buildings on my left, and a one-story municipal building that houses the offices of a hydropower plant hidden below it on my right. The last mill closed its operations in 2017, and these old, red-brick buildings sit empty, reminders of a bygone industrial era. These mills along the river delineate the boundary of Turners Falls, the main village of the town of Montague. It’s easy to see where it got its nickname, “Powertown.” I cross the canal that separates this strip of land from the river, turn left at the other side of the canal, wind my way up the hill, then turn right and stop at the traffic light that marks the main intersection of downtown Turners Falls. Red-brick buildings with storefronts on the bottom and apartments on top line the streets. They are quaint, seemingly ripe for a wave of gentrification that never quite seems to arrive.

I turn left away from town and again toward the river. Ahead of me is a long bridge that spans a yawning gap in the earth. To the right is the flat open water of a cove created by a long dam that sits just below the bridge and out of my sight. This dam sits atop a natural ridge that was a huge waterfall before human beings harnessed the power of the river. The cove to my right is glassy, and the waterfall to my left is a trickle, evidence of the dry season. On the shore of this cove is the site of a famous battle in 1676 in which hundreds of unarmed Indigenous people were massacred when the English colonist Captain Turner and his militia attacked their fishing encampment. The falls, village, and high school are named after Captain Turner, and the high school’s mascot, the “Indians” is purported to honor those who bravely fought and died in the battle. As a resident of this area, I know that after a heavy rain, or during the spring melt when the winter has been snowy, Turners Falls booms as the river crashes into itself on its way down to the split where the river and canal separate. For now, it is as quiet and peaceful as this beautiful fall day.

On the other side of the long bridge I cross the Mohawk Trail, the name given to Route 2 in this part of the state, which is the northern east-west highway. The road winds north into the small, rural town of Gill through grassy fields and actively cultivated plots of land. I pass a farmstand, and a parking lot full of
yellow school buses. Cows wander on the hillside near the low buildings of a dairy farm. Old farmhouses mingle with newer suburban-style construction. I turn around on a dirt road bordering a freshly turned field with tractors sitting idle. I drive back the way I came and cross the bridge back into downtown Turners Falls. At the main intersection, I turn left and head up a hill, which is covered with aging, yet still stately Victorian style homes that look down on the rental properties and small businesses of downtown Turners. Evidence of class juxtaposition is common in this area. It is a geography shaped by rivers as well as human economics. I wind my way up the steep hill and the land flattens out. I pass a housing project built around a grassy common area cluttered with toys and charcoal grills. A white woman in a gray hoodie sweatshirt lights a cigarette as I pass. I travel through suburban neighborhoods with modest, well-kept homes, past a large cemetery that takes up space on both sides of the road, and through an exceedingly flat and grassy area with sandy soil—the ancient remnants of a river's mouth.

- Fieldnote, September 25, 2016

My selected case is the Gill-Montague Regional School District (GMRSD), a small, regional, traditional PK-12 public school district in rural Franklin County, Massachusetts. This school organization is a “critical” case that can affirm or disprove a concept by illustrating a “most likely” or “least likely” scenario (Flyvbjerg, 2001). The district is subject to high levels of centralized accountability from its authorizer, the Massachusetts Board of Elementary and Secondary Education (BESE), and faces high levels of competition from multiple private schools located in the area, as well as state school choice policies that have been in place since the mid-1990s that were intended to increase competitive pressure on public schools. The GMRSD’s struggles to meet accountability requirements for over ten years illustrate the problematic assumption that the combination of high accountability and competitive pressures drives school performance improvements.

Mapping elements in the GMRSD organization using the conceptual approach described in Chapter 2 provides an illustration of how institutional pressures and garbage can processes produce organizational decisions in a real life context, which provides insight into how these focus education reform efforts are problematic drivers of school improvement. I begin this section with a basic description of the geographic and demographic characteristics of the case. I then describe the policy environment regarding
school enrollment and choice, funding, and governance. Finally, I describe patterns in the GMRSD that have occurred as a direct result of these policies.

**Geographic Characteristics**

Franklin County, Massachusetts straddles the Connecticut River in the western part of the state, and is bordered by Vermont and New Hampshire to the north. The GMRSD is comprised of two towns: Gill (pop. ~1,600) to the north, and Montague (pop. ~8,300) to the south. A third town to the east, Erving (pop. ~1,900), has a contract to send its students in grades 7-12 to GMRSD schools on a tuition basis, as the town does not support its own secondary school. The Connecticut River forms the eastern border of Gill, veers west and widens into a calm reservoir area called Barton Cove, crashes over a wide and towering waterfall called Turners Falls, then turns south, and forms the western border of Montague. A long bridge over the falls connects the two towns.

Below the falls, a canal lined with vacant 19th century, red-brick mill buildings and an active hydropower plant splits off from the river. This area was a center of industry in the last century, but over time these businesses fell into decline, and no significant industry has taken their place. As a result, the area is in a period of economic stagnation. The area features a mix of rural farmland, mid-twentieth-century suburban housing developments, and downtown city-like settings, each with distinct geographic and demographic characteristics. See Figure 3A for a map of the three towns, and the location of the GMRSD’s five schools: Gill Elementary School (grades K-6), Hillcrest Elementary School (grades PK-1), Sheffield Elementary School (grades 2-5), Great Falls Middle School (grades 6-8), and Turners Falls High School (grades 9-12). The middle and high schools are co-located in a single building.
Montague is the largest of the three towns, and is divided into five distinct villages.

The main village of Turners Falls contains the canal and mills on its western edge, and is further subdivided into neighborhoods. Downtown “Turners” (as many locals call it) features a main street of red-brick buildings with storefronts on the bottom and low-cost rental apartments on top that originally housed mill workers. This street is intersected by several cross-streets that also have multi-family rental housing in various states of repair, and some small businesses. Along these streets are several churches established by the Irish, Polish, Italian, and French immigrant communities that were attracted by work in the mills, and who built the community in the late-nineteenth and early-twentieth centuries.
There is a strip of land between the canal and the river downstream from the mills that contains a neighborhood colloquially called “The Patch.” It hosts a small grid of streets with single- and multi-family homes that originally housed millworkers. The Patch is effectively an island, and is only accessible by one centrally-located bridge that connects it to the downtown area. From the main intersection in Turners, one can drive east up a steep hill crowded with aging Victorians that were originally built for mill owners. This neighborhood, called “The Hill,” leads into a high flat area called “The Flats,” which is full of modest, mid-twentieth-century, single-family homes. This area is also where four of the five GMRSI schools are located (the fifth is in Gill). See Figure 4A for a map of the neighborhoods of Turners Falls.

Figure 3.2: Neighborhoods of Turners Falls

There are four additional villages in Montague. On the east side of town is the village of Millers Falls, which is another former industrial center located on the Millers River. This
is effectively a smaller version of Turners Falls, yet is isolated from main roads. There is a lot
of rental housing, and modest single-family homes. Its residents tend to be economically
disadvantaged. In the central part of Montague is the village of Lake Pleasant, which hosts a
collection of older cottages clustered around a lake that is off the beaten path. This was a
popular resort community in the late 1800s, but was consumed by fire, abandoned as a
destination, and subsequently rebuilt with small cottages. One would not inadvertently pass
through Lake Pleasant on the way to anywhere else. The village of Montague City is a small
residential section southwest of Turners Falls, and across the river from the small city of
Greenfield (pop. ~17,500). Two bridges connect Montague to Greenfield (the county seat),
yet steep and narrow roads make foot travel between the two difficult. The village of
Montague Center is a picturesque, wooded area in the south section of town. Despite what
its name suggests, it is not centrally located in Montague, and it has the feel of being a
different town altogether due to a cluster of buildings along the main street that includes a
post office, a general store, and several large homes.

The area to the south of Montague Center contains several colleges and universities,
including the flagship campus of the University of Massachusetts in the town of Amherst,
and this village tends to be economically stronger than the rest as a result of its proximity to
higher-paying jobs. Montague Center contains an architecturally interesting mill building
situated on a small river that trickles down a picturesque rocky outcrop directly behind it.
This building houses local businesses that are popular with tourists and politically
progressive locals including a dusty used book shop called “The Bookmill” that has lumpy
stuffed chairs and unfinished wooden shelving scattered about odd-shaped rooms on several
levels. Their bumper stickers are somewhat ubiquitous on cars in the area and feature the
slogan, “Books you don’t need in a place you can’t find.” This mill complex also contains
two small restaurants, an arts and crafts gallery, and a used record and CD store. Outdoor seating makes this a popular place to hang out on warm, sunny days.

The town of Montague tends to dominate the GMRSD due to its size and concentration of businesses. From the north end of the bridge over Turners Falls, the road heads north into the bucolic town of Gill, which contains many farms along the fertile flood plain of the Connecticut River, as well as the elite boarding school Northfield Mount Hermon. Also from the end of the bridge, one can drive east to the town of Erving on MA Route 2, which is also called the “Mohawk Trail” in this part of the state. This is the main east-west highway connecting the urban areas north of Boston to the Berkshires, and eventually Albany, NY. There are some small stores and restaurants along Route 2 in Erving, as well as an active paper mill, but most travelers never venture north into other parts of the town, which is otherwise quite rural. The steep topography on this side of the river makes farming less of an industry in this area, and forests dominate the landscape.

I get in my car at home and drive along the ridge above the Connecticut River toward Montague. The deciduous trees have lost almost all of their leaves, and I’m able to look across the valley to the houses and buildings of Turners Falls. It’s still difficult to see the river far below from this vantage point. At the bottom of the steep hill, the road turns abruptly to the right onto a bridge that spans the river. There’s a clog of about three cars in front of me, and more coming the other way, including a short yellow school bus. As I cross the river, I look right over the water, which continues to be low due to the drought. The rocky ledge that forms the bottom is showing across more than half of the riverbed. The late afternoon winter sun hits the water in between and reflects harshly into my eyes. The bridge ends and I cross a very short strip of land. My car lurches over the warped entry point of the bridge that crosses the canal between the river and the town. At the far bank of the canal I turn left and drive up the hill on the other side. The long stretch of red-brick mill buildings that line the space between the canal and the river appear to my left as I rise in elevation. The mill closest to the bridges is still in operation, and the others have been empty and crumbling for decades. At the top of the hill I’m looking down on the tops of these structures. I turn right and stop at the traffic light one block down at the main intersection of Turners. It’s a sunny day, and many people are walking around.

I cross the intersection when the light turns green and continue straight ahead, passing red-brick boarding houses from the turn of the 19th century, aging wooden multi-family homes with balconies across their fronts, and small storefronts. To my left is a large park that sits next to the bulge in the river created by the massive dam just downstream that feeds the canal as well as the river below. I pass a gas station on the right that marks the end of the flat downtown area and the beginning of a climb. I now know that this area of town is called “The Hill” by locals, and the name is fitting. The Hill is colonized by aging Victorian era homes that perch on its steep incline. To my right, the houses are way above my head on the top of an almost vertical cut in the earth that accommodates the road. It is covered with brambles and has a retaining wall on
the lower half. I see a cracked and narrow asphalt path with a slouching wooden railing on its downhill side twist its way up the edge of the roadcut to the houses above. It looks like a shortcut path from the road to the houses above that was eventually paved at some point a long time ago. I notice that many of the cars that are passing me going the other direction are driven by young people. I realize that school has probably just ended, and they're headed into their afternoon routines.

At the top of the winding hill, the land suddenly becomes perfectly flat. I take a right fork almost immediately at a package store, which is next to a pool and spa supplies shop with an actual turquoise colored pool slide attached to the roof like a bizarre figurehead. There are acres of housing projects on my right. Otherwise, this part of town is full of modest one-family homes and suburban ranch style construction. Some of the houses are meticulously cared for and have neatly landscaped yards. Others have peeling paint and trash lying around. There doesn’t seem to be patterns in the distribution of home maintenance. If I had taken the left fork, I would have arrived at the local tech school in about a mile. I pass the abandoned shell of a cinderblock building that used to contain a “creamy” [a soft-serve ice cream and food stand with outdoor service]. Sometimes, we used to go there after dinner, but the creamy hasn’t been open for two summers now. Just past it is a four-way stop. I arrive at the intersection at about the same time as a large black pickup truck that’s directly across from me. My blinker is on to turn left, as is the truck’s. Despite the fact that we can both turn our respective lefts without hitting each other, the driver waves for me to turn first. I raise my hand in recognition and turn left. In half a minute, the high school is on my right. I park and head in through the main doors. The woman with the yellow hair is sitting at her customary desk in the office, as she has been all the other times I’ve visited Turners Falls High School, and we wave to each other.

- Fieldnote, December 9, 2016

**Demographic Characteristics**

The towns of Gill, Montague, and Erving have traditionally been home to homogeneous communities of working-class white people. Due to a relative lack of residential mobility, the communities overall are aging. The towns differ in some demographic attributes. Montague’s population is over four times as large as Gill’s and Erving’s, and has a population that is less educated, and more working class. Gill’s population is the most affluent and educated. There have been noticeable increases in racial, linguistic, and socioeconomic diversity over the past few decades, especially in Montague, and especially among young people. These demographic shifts are reflected in school enrollment.

**Increasing residential diversity.** Franklin County is becoming more racially and economically diverse. All three GMRSD towns currently have a population that is over 90 percent white, which reflects Franklin County as a whole. An increase in immigrants—
primarily from Central and South America, and Eastern Bloc countries in Europe—is resulting in greater linguistic, cultural, and racial diversity. In addition, an increasing number of black and Latinx families are moving into the area from the urban cities of Holyoke and Springfield, likely attracted by affordable housing, and safe communities. Franklin County is a concentrated site of adult opioid drug use within the national opioid epidemic, and this has increased the number of unstable and economically disadvantaged families living in the area.

Counterbalancing this increase in poverty is a small wave of gentrification flowing into this area from the relatively economically prosperous “Five College” area to the south. Affordable housing and business properties in downtown Turners, as well as the educated and politically liberal population in Montague Center, are attractive to individuals and families who have been priced out of real estate markets to the south, or are looking for a smaller community. They tend to be socially liberal, middle- or upper-middle class, and have professional-level jobs. Recent graduates of the five colleges are attracted to the affordable rental housing in downtown Turners.

Montague, Gill, and Erving differ in terms of demographic characteristics. Montague is the most racially and socioeconomically diverse, and has the highest proportions of traditionally disadvantaged groups. Gill’s residents are the most racially homogeneous and socioeconomically advantaged. The proportion of Montague residents who are poor is almost double that of Gill, 50 percent higher than that of Erving, and higher than the county and state. Residents of Montague are also less educated, especially in comparison to those in Gill. See Table 3A for descriptive statistics.

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3 The city of Holyoke has one of the country’s highest concentrations of Puerto Rican residents.
4 The five colleges are Hampshire College, Amherst College, and the University of Massachusetts in the town of Amherst; Smith College in the small city of Northampton; and Mount Holyoke College in the town of South Hadley.
Table 3.1: GMRSD Local and State Demographics*

<table>
<thead>
<tr>
<th>Category</th>
<th>Gill</th>
<th>Montague</th>
<th>Erving</th>
<th>Franklin County</th>
<th>MA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>1,656</td>
<td>8,325</td>
<td>1,871</td>
<td>70,916</td>
<td>6,742,143</td>
</tr>
<tr>
<td>White</td>
<td>91.6%</td>
<td>90.4%</td>
<td>94.5%</td>
<td>93.7%</td>
<td>79.3%</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$74,167</td>
<td>$53,178</td>
<td>$62,171</td>
<td>$56,347</td>
<td>$70,954</td>
</tr>
<tr>
<td>Individuals Below Poverty Level</td>
<td>8.0%</td>
<td>15.7%</td>
<td>11.2%</td>
<td>11.3%</td>
<td>11.4%</td>
</tr>
<tr>
<td>High School Graduate or Higher</td>
<td>97.2%</td>
<td>88.5%</td>
<td>93.8%</td>
<td>92.8%</td>
<td>90.1%</td>
</tr>
</tbody>
</table>

* U.S. Census Bureau, 2012-2016 American Community Survey 5-Year Estimates

These demographic differences contribute to people’s perceptions of the towns and schools. Three neighborhoods of Montague have local reputations as being economically disadvantaged: downtown Turners Falls, The Patch, and Millers Falls. Turners Falls has a lot of rental property, some of which has seen better days (i.e., peeling paint, sagging porches, leaky windows, graffiti, trash), and this contributes to perceptions of economic decline.

Many of the old-time families who have lived in the town for generations live “on the Hill” and “in the Flats.” The Hill is locally considered to be more affluent due to the large number of large Victorian homes in various states of repair, some of which have many cars parked in the driveway indicating that they have been subdivided into rental units. The Flats features many single-family homes with well-maintained landscaping, as well as low-income housing developments, which tend to be designed as apartment units that surround the four sides of a grassy courtyard area. These compounds often have discarded furniture, bicycles, children’s toys, and charcoal grills distributed around the perimeter and in the courtyards. Visual indicators of relative wealth and poverty show the socioeconomic diversity of Montague, and also contribute to local perceptions about the GMRSD schools.
Declining student population. While the overall population in Franklin County has remained relatively stable over time, the percentage of residents over age 65 is increasing, and the percentage of school-age residents is decreasing. From 1990 to 2010, the number of individuals in the county under age 18 declined from 17,304 to 14,068, and dropped from close to 25 percent of the total population to under 20 percent (see Figure 3C). This is contributing to declining enrollment in the schools.

Figure 3.3: Franklin County Population, 1930-2010, and Percentage of Franklin County, MA Residents Under Age 18, and Over Age 65, 1990-2010*

* U.S. Census Bureau

MA DESE records indicate that the total number of school-age Montague residents has been declining for over thirty years, while the number of school-age residents who live in Gill and Erving has remained relatively stable (see Figure 3D). Since Montague is the most populous town in the district by far, this decline has a substantial effect on total enrollment in the GMRSD schools.
GMRSD School Characteristics

The GMRSD supports five schools, four of which are located in The Flats. These include: Hillcrest Elementary School for students in Kindergarten and Grade 1, Sheffield Elementary School for students in grades 2-5, Great Falls Middle School (GFMS) for students in grades 6-8, and Turners Falls High School (TFHS) for students in grades 9-12. The two secondary schools share a building. The fifth school is the Gill Elementary School, which serves students in grades K-6, and is located in Gill. The town of Erving supports a separate school district that operates the Erving Elementary School for students in grades K-6, and has a contract to send its residents in grades 7-12 to GFMS and TFHS.

The GMRSD student population is more racially diverse than the adult population, and is changing rapidly. The percentage of white students has dropped significantly in the
past 30 years from 95.7 percent in 1995 to 80.4 percent in 2017. See Figure 3E for a graph of racial changes to the GMRSD enrolled student population over time.

**Figure 3.5: Percent GMRSD Enrolled Students by Race, 1995-2015***

![Graph showing racial changes to the GMRSD enrolled student population over time.](image)

* MA DESE School Attending Children Reports

In 2016-17, all GMRSD schools enrolled a higher percentage of white students than the state average, and racial demographics varied by school. Sheffield ES and Hillcrest ES enrolled the most students of color at 29 and 26.4 percent respectively, and Gill ES was the whitest with only 12 percent students of color. The largest non-white racial group in any school is Latinx, with Hillcrest and Sheffield ESs enrolling approximately 17 percent each. There was also a comparatively large percentage of multi-race, non-Latinx students, in all schools, but especially in Sheffield ES and Hillcrest ES. See Figure 3F for district, school, and Massachusetts student enrollment percentage by racial category.
The GMRSD schools are becoming increasingly diverse in terms of socioeconomic status, and higher percentages of GMRSD students are on the lower end of the continuum than the towns overall. The percentage of students designated as “low-income” based on their participation in the federal free and reduced-price lunch (FRPL) program rose sharply
from 30 percent in 1995 to 52 percent in 2010 (MA DESE School Profiles). The state changed how it identified economically disadvantaged students around 2015, thus it is difficult to compare this to the rest of the data, although anecdotal information from school leaders indicates the level of economic need remains high.

The DESE designation “high needs” indicates that a student is in one or more of the following categories: English learner, student with disability, and/or economically disadvantaged. The percentage of English learners enrolled in GMRSD schools rose dramatically from 0.8 in 1995 to 6.1 in 2015. The district enrolls a higher percentage of students with disabilities than the state (20 percent versus 17.4 percent in 2016-17). This proportion has remained relatively stable over time; however, anecdotal information indicates the level of need for these students has increased. For example, the GMRSD director of business and operations reported several times to the school committee in 2016-17 that the number of “out of district placements” (i.e., students enrolled in specialized private programs at the district’s expense due to the severity of their disability) was higher than expected. See Figure 3G for the percentage distribution of students enrolled in GMRSD schools by these selected populations in 2016-17, and compared to state percentages.
As evidenced by the data above, there are stark demographic differences among GMRSD schools. Gill is the town with the highest average income level, and Gill ES is the whitest school. In 2016-17, it also had the lowest percentages of students with disabilities (12.8 percent), economically disadvantaged students (32.5 percent), and no English learners.
The relatively high percentage of high needs students at Gill ES (42.7 percent) indicates there is little overlap between students with disabilities and economically disadvantaged students. In contrast, Hillcrest and Sheffield ESs have much higher proportions of economically disadvantaged students, students with disabilities, and English learners, and this is also reflected in their percentages of high needs students (70.3 and 66.4 percent respectively). The middle school has a significantly higher proportion of students with disabilities than the high school (24.4 percent compared to 16 percent). This implies that a disproportionate number of eighth graders with disabilities choose to attend other schools for high school. A possible explanation is that the Franklin County Regional Vocational-Technical High School (FCTS), which is located in Turners Falls, traditionally enrolls a high percentage of students with disabilities (28.5 percent in 2016-17), and is attracting many GMRSD students in this category. These demographic differences between GMRSD schools affects school reputations and patterns of school choice among families.

**Massachusetts Education Policy Environment**

Twin education reforms in the 1990s increased competition among schools, and focused curriculum and instruction on standardized statewide assessment. The Interdistrict School Choice Program started in 1991, and allows any student to enroll in any traditional public school district in the state that elects to participate. It was intended to increase competitive pressure on schools, and to provide higher quality school options to students who were “stuck” in failing schools. Soon after, the Massachusetts Education Reform Act of 1993 (MERA) established high academic achievement and attainment standards for every student, a statewide assessment system to measure progress toward these standards, an accountability system to hold districts responsible for meeting set benchmarks, and a revised school finance system to ensure adequate resources regardless of district fiscal capacity.
(Chester, 2014). MERA also introduced charter schools, which increased competition, and a statewide labeling system based on accountability measures that ranked schools in order for families to be able to easily choose between them. The first charter schools opened in 1995, although none of them were close enough to the three GMRSD towns to constitute a significant threat until the Four Rivers Charter Public School opened in Greenfield in 2003. These reforms served to tie the GMRSD more tightly to its institutional environment by constraining its ability to set its own definitions of acceptable performance, and by publicizing its performance to the entire marketplace and beyond. In addition, the GMRSD must abide by the regionalization agreement set by the towns of Gill and Montague. I describe these various aspects of the public school policy environment in this section.

**Standards-based accountability.** Prior to MERA, local school committees were able to judge the relative effectiveness of their schools on their own terms. Now, all public school organizations in Massachusetts are held accountable to the same requirements for student achievement (performance and growth on standardized tests in English language arts, mathematics, and science/technology), and attainment (graduation from high school), or risk penalties as serious as state receivership, or closure in the case of charter schools.

Schools and school districts are labeled according to a system that synthesizes all of the accountability metrics into Levels 1-5 (1 being the best). A district is automatically placed at the level of its lowest-performing school. By design, 80 percent of all schools in the state are categorized as Levels 1 or 2, and Level 3-5 schools are in the lowest 20 percent. Level 3 districts have priority assistance from DESE, and are expected to engage in self-directed processes to develop and implement an improvement plan. Level 4 schools must engage in the same processes, but do not have autonomy. Level 5 schools enter into state receivership and lose all autonomy.
Public school quality has become somewhat synonymous with these levels as a result.

The ways in which the state publishes this information is intended to be easily accessible online, yet is multi-layered, visually dense, and can be difficult for lay people to navigate and understand. Private schools are independently run, and are not held accountable to meet student achievement and attainment requirements. See Figure 3H for a diagram of the MA DESE leveling system that was in place during the 2016-17 school year.

**Figure 3.8: MA DESE Framework for District Accountability and Assistance**

<table>
<thead>
<tr>
<th>Framework for District Accountability and Assistance</th>
<th>August 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>District Actions</strong></td>
<td><strong>Accountability</strong></td>
</tr>
<tr>
<td>Review &amp; approve district and school improvement plans</td>
<td>Conduct district reviews for randomly selected districts</td>
</tr>
<tr>
<td>Use district analysis &amp; review tools to review &amp; approve district &amp; school improvement plans</td>
<td>Conduct district review for randomly selected districts</td>
</tr>
<tr>
<td>Use DESE’s self-assessment process, to review plans &amp; monitoring strategies</td>
<td>Conduct selective district reviews</td>
</tr>
<tr>
<td>Collaborate with DESE to implement existing Level 4 schools or develop a DESE approved remedial plan that addresses rapid implementation of Condition for School Effectiveness, if required, develop a Level 4 district plan to accelerate district improvement &amp; strengthen support &amp; interventions in lowest performing schools</td>
<td>Give priority for assistance, plan guided self-assessment, planning guidance, etc.</td>
</tr>
<tr>
<td>Operate under joint district/DESE governance</td>
<td></td>
</tr>
</tbody>
</table>

*MA DESE*

All public school districts in Massachusetts have full autonomy with regard to teaching and learning. There are state curriculum frameworks that outline what students should know and be able to do at each grade level, and in each core academic discipline, but
there are no required curricula or instructional approaches, as there are in other states. This is intended to give local control to districts. Under federal law, schools are required to use curriculum and instructional approaches that are based on scientific research, but as long as their students are performing in line with set benchmarks, and graduating “on time,” no centralized authority questions their choices.

Under a prior version of this system, the GMRSD had been labeled “underperforming” in 2007 (effectively “Level 4”), and was required to be on a DESE “Turnaround Plan.” After BESE made changes to the accountability policies, GMRSD was labeled “Level 4” in 2011, and was required to be on a DESE-supervised “Accelerated Improvement Plan” (AIP). While improvements had been made since that time, in 2016-17 the district was labeled “Level 3,” meaning it was at risk for dropping into the underperforming zone again, and was engaging in a self-directed improvement process. All other public schools in the GMRSD marketplace were labeled “Level 1” or “Level 2” in 2016-17 (MA DESE School Profiles, 2016). While there is local organizational choice regarding how schools attempt to meet accountability requirements, the benchmarks are defined at the state level, as are consequences for not meeting them.

School enrollment and choice. Until the education reforms of the 1990s, school enrollment in MA was defined solely by residence, or by ability to pay private school tuition (or obtain a scholarship). There is an established, decades-long tradition of about five percent of Gill, Montague, and Erving families enrolling their children in private schools, or engaging in homeschooling. Public school enrollment boundaries were permeable solely by family residential mobility. Now, students who live in Gill, Montague, and Erving have additional public school options. Gill or Montague residents are assigned to a GMRSD elementary school based on residence (Montague residents are enrolled in Sheffield ES and
Hillcrest ES, and Gill residents are enrolled in Gill ES), or they may apply to attend another GMRSD school if there is more than one option at their grade level through an intradistrict enrollment policy. There is no official financial exchange between schools when students elect intradistrict enrollment because they are all operated by GMRSD. The trend is for Montague residents to choose into Gill ES, and not the other way around. The middle and high schools are regionalized, and residents of the three towns are automatically enrolled in them in grades 7-12 unless they choose another school outside the district.

State policies allow any parent who lives within Massachusetts boundaries to select from multiple public options including another district’s school, a charter school, or a vocational-technical high school. Local school committees cannot prevent students from leaving the district, although they can choose whether or not to accept students who live in other towns through the Interdistrict School Choice Program, which the GMRSD does every year. The three GMRSD towns are members of the Franklin County Regional Vocational-Technical School (FCTS), which has enrolled students in grades 9-12 since 1976. This has always been a popular option for students who live in the three towns, many of whom are from working-class families and for whom education in a trade is seen as a viable career path.

All public schools of choice require applications. Interdistrict choice and charter applications are selected by lottery, and FCTS uses selective admissions criteria based on students’ grades, attendance, and disciplinary records. FCTS provides transportation to all enrolled students, and students who enroll through interdistrict choice, or into a charter school are required to obtain their own transportation. This can be a barrier for some families. These regulations make geographic boundaries extremely relevant for the GMRSD,
and relatively irrelevant for families as long as they can surmount admissions and transportation barriers.

Public school funding. A traditional public school district’s funding in Massachusetts is determined by its geographic location, the students who live within its geographic boundaries, and the relative wealth of all residents. The state sets a “foundation budget” for each traditional public school district based on its enrolled students and demographics from the prior year, and districts are required to fund schools at this minimum amount. The state calculates the percentage each district is required to contribute toward its foundation budget based on estimated property tax revenue. Each district’s school committee may add an additional amount if so desired that is funded by local tax revenue, and all of the traditional public school districts in the GMRSD area choose to do so.

Residents of the towns of Gill and Montague are eligible to vote on how much additional money they contribute to their public schools, and the process by which this occurs is managed by town governments. The GMRSD is beholden to them for the final outcome. The total amount of each district’s budget is divided between the number of students in grades K-12 and referred to as the “per-pupil allocation,” which ranges widely. In 2016, Franklin County allocations ranged from approximately $12,700 per student in the town of Orange to $22,600 in the town of Rowe, with GMRSD’s at approximately $16,400 (MA DESE statewide financial reports, 2016). Students who were enrolled in private or homeschool options during the prior year are not counted as part of a district’s students.

Most vocational-technical high schools in the state operate as independent districts, and receive funding directly from the state and towns. Like private schools, these students are also not included in traditional public school districts’ student counts when determining state funding. Charter schools are funded by each enrolled student’s sending district based
on its per-pupil allocation, plus a small additional amount for facilities costs. There are contested interpretations of the fairness of this formula: one is that “the money follows the child” and the other is that towns have allocated this money to their in-district schools, and should not be required to fund other schools at the same level. The state is supposed to reimburse the sending district 100 percent in the first year, and 25 percent each year for five additional years in order to offset the financial impact of charter school enrollment on local districts, but this reimbursement had not been fully funded by the legislature in recent years. This means that traditional public school districts had been receiving less in reimbursement than required by law. Interdistrict enrollment involves a flat tuition payment of $5,000 from the sending district to the receiving district—a fraction of the per-pupil allocation—plus additional funds to cover the costs of any special education services that are required on an individual student basis.

Tuition for charter schools and interdistrict school choice flow into and out of traditional public school district budgets, and therefore are more visible to school committees. This contributes to the perception that these types of school choice are more of a financial threat than lost revenue due to vocational-technical schools, private schools, and homeschooling. Surprises can and do occur when a student who has been in a private or homeschool option elects to attend a charter school, or participate in interdistrict school choice, and the district of residence is suddenly responsible to pay for a student who had previously not been counted (although for charter schools, this cost is reimbursed 100 percent in the first year).

In addition to setting tuition and reimbursement amounts for school choice, the state also sets reimbursement rates for student transportation, insurance/benefit rates for public school employees, and reimbursement rates for special education services, which represents
a lack of local financial control. Rural districts with large geographic areas and few schools—like the GMRSD—have higher transportation costs than urban districts in which schools and students are spatially concentrated (Wulfson, 2018). Rural districts also have higher percentages of per-pupil funding allocated to fixed costs such as facilities and nursing services that are distributed across fewer students than in urban districts (Wulfson, 2018). All public school districts can apply for grants to supplement their programs, which include federal options (e.g., Title I, Title III), state options (e.g., competitive grants for professional development), or private options (e.g., grants obtained through partner not-for-profit organizations). They are allowed to accept private donations as well. As with enrollment policies, local school committees have less control than one might assume over their finances.

**Public school governance.** Each traditional public school district in Massachusetts is governed by an elected school committee. Based on state law, the school committee has the power to select and terminate the superintendent of schools, review and approve budgets for public education in the district, and establish educational goals and policies for district schools consistent with the requirements of law and statewide goals and standards established by the MA BESE (MGL, Part I. Title X. Chapter 71: Section 37). The majority of school governance responsibilities are directly tied to policies set by the state as opposed to local towns; however, it is important to recognize each local school committee’s role in setting and maintaining policies that outline the mission, vision, and values of the organization (Bohley, 2016; Rallis, Rossman, Cobb, Reagan, & Kuntz, 2008). For example, public schools are held accountable to meet state-set benchmarks for student achievement and attainment, but pedagogical philosophy and related instructional approaches are decided at the local level by district leaders.
Like many towns in less populous areas of the state, the towns of Gill and Montague have a regionalization agreement. This occurred in stages with grades 7-12 regionalization in 1970-71, and full K-12 regionalization in 1981-82. Per this agreement, the GMRSD school committee controls all public schools in Gill and Montague, and has elected representatives from both towns (three from Gill, six from Montague) that communicate with town advisory committees. Voters in the two towns agree to the district’s budget each year, as local tax assessments pay for the part that is not provided by state aid.

The agreement states that all students who live in Gill or Montague must have a K-6 option in their town of residence, and “Children in grades seven through twelve shall attend schools within the geographic limits of the School District, and within a radius of five miles of the center of the Montague-Gill Bridge” (Gill Commission on Education, 2009). This prevents the GMRSD from closing Gill ES, or from moving the secondary school outside of the towns, or to a location further than five miles from the bridge over Turners Falls that separates Gill from Montague without the towns voting on this change. The agreement states that the two towns lease the school buildings at no cost to the GMRSD, but are responsible to repair, maintain, and remodel them at their own expense. Expenses related to maintaining the aging facilities are a perennial concern.

The Marketplace of Schools

Within approximately a 20-mile radius of Montague is a large set of public and private schools in a range of grade configurations (e.g., K-6, 7-12). The marketplace includes 60 traditional public schools, four charter public schools, 18 private schools, and three specialized schools (e.g., the Clarke School for the Deaf in Northampton), most of which function as “out-of-district placements” paid for by the GMRSD to support students with
specialized needs that cannot be addressed in-house. In addition, many students who live in
the area are homeschooled.

Cities and towns in the two Massachusetts counties surrounding Gill, Montague, and
Erving (Franklin and Hampshire) range in size, as well as student population size. Greenfield
(pop. ~17,500), Amherst (pop. ~37,800), and Northampton (pop. ~28,500) are the largest
cities, and there are many small towns, especially in the hilltowns of the Berkshires to the
west. Franklin County hosts five elite private boarding/day schools: Deerfield Academy
(grades 9-12), Northfield Mount Hermon (grades 9-12), the Stoneleigh-Burnham School
(girls, grades 7-12), the Eaglebrook School (boys, grades 6-9), and the Bement School
(grades K-9). This is in addition to many smaller day and/or boarding schools and parochial
schools in the wider geographic region, including the Greenfield Center School (grades PK-
8), which is popular among highly educated parents who are looking for a progressive
educational setting. See Figure 3I for a map of public school districts showing relative
enrollment (including charter schools), and Figure 3J for a map of the location of private
schools.
Figure 3.9: Public Schools within 20 Miles of Montague with Total Enrollment
Figure 3.10: Private Schools within 20 Miles of Montague

School Enrollment Shifts

In the 1990s, competition in the GMRSD’s geographic region increased significantly. The state’s Interdistrict School Choice Program started in 1991, and traditional public school districts surrounding the GMRSD increasingly elected to participate in order to enroll non-resident students and accept tuition payments. The first charter schools in the state opened in the mid-1990s. In the GMRSD area, this included the Hilltown Cooperative Charter School (K-8), and the Pioneer Valley Performing Arts Charter Public School (7-12). Both of
these schools are approximately 45 minutes away by car from Turners Falls, and do not draw many GMRSD students away from their local schools due to that daily commute. In 2003, the Four Rivers Charter Public School (7-12) opened in neighboring Greenfield, and is easily accessible by families that can obtain their own transportation. The Pioneer Valley Chinese Immersion Charter School (K-12) opened in 2007 in Hadley, approximately 30 minutes to the south. The effects of these various school choice policies began to be noticeable to GMRSD leaders in the early 2000s as increasing choice options came into the marketplace, and families became aware of them.

**Shifting enrollment patterns.** The percentage of Gill and Montague resident students in grades K-12 who enrolled in schools outside the district rose from 14 percent in 1990 (primarily to FCTS and private schools/homeschooling) to 41 percent in 2015. This, coupled with the parallel 20 percent reduction in total students outlined earlier, represents a significant loss of public education income from the state. This timing mirrors the rise in public school options through policy changes intended to increase competition (i.e., Interdistrict School Choice and charter schools). The GMRSD is in the top ten percent of traditional public school districts in the state with regard to student enrollment in schools of choice. See Figure 3K for a graph and table of the number of Gill, Montague, and Erving resident students and their school enrollment choices by type from 1990 to 2015.
In the 2016-17 school year, GMRSD schools enrolled 951 students in grades PK-12, eleven percent of whom “choiced in” from other public school districts (775 of these students actually lived in Gill or Montague). However, over 35 percent of the 1,213 students who live in Gill or Montague elected to enroll in schools outside of the district. According to this MA DESE data, the GMRSD has twice as high a proportion of students who choose other school options than the state average (~36 percent compared to ~18 percent). Its proportion of students who elected to enroll in other traditional public school districts is
almost eight times that of the state average, and for those who enrolled in vocational-technical high schools is over 14 times that of the state average.

In 2016-17, resident students who lived in Gill and Montague chose to enroll in one of 19 traditional public school districts, one of the four area charter public schools, FCTS, or a private school/homeschooling. Once students are accepted into a traditional public school district through the Interdistrict School Choice Program, including “feeder” schools (i.e., elementary schools that feed into a regionalized secondary school), they can remain enrolled until graduation. Schools in the GMRSD marketplace span a wide geographic region, with some of them being located an hour driving distance away. See Figure 3L for a comparison of distribution percentages between Gill/Montague and Massachusetts.

Figure 3.12: Chart and Associated Data Table – Gill and Montague K-12 Student Resident Enrollment by #FTE and %FTE with MA Comparison, 2016-17*

<table>
<thead>
<tr>
<th>Gill &amp; Montague</th>
<th>% Local</th>
<th>% Voc-techn</th>
<th>% Charter</th>
<th>% Interdistrict</th>
<th>% Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gill &amp; Montague</td>
<td>63.9%</td>
<td>5.7%</td>
<td>5.9%</td>
<td>17.8%</td>
<td>6.3%</td>
</tr>
<tr>
<td>MA</td>
<td>82.3%</td>
<td>0.4%</td>
<td>3.8%</td>
<td>2.3%</td>
<td>8.6%</td>
</tr>
</tbody>
</table>

* MA DESE School Attending Children Report, 2017
Recent school enrollment patterns. All school districts in Franklin and Hampshire Counties participate in the state’s Interdistrict School Choice Program except one: Deerfield Elementary School (a one-school district that feeds into Frontier Regional Middle/High School). Until recently, this district had participated, but stopped because they had a high percentage of school choice students, and were starting to realize that there were diminishing returns when each student only brought in $5,000 as opposed to the full per-pupil amount. Students already enrolled were grandfathered in, and could stay through grade 12. GMRSD regularly accepts fewer students than it loses to other districts. There is no reciprocal relationship between charter schools and sending districts. See Table 3B for a list of schools in which Gill and Montague residents enrolled in the 2016-17 school year including net student full-time enrollment (FTE) and net payment/income for the GMRSD.

Table 3.2: Public Schools in Which Gill and Montague Residents Enrolled, 2016-17 with Net Student Full-time Enrollment, and Net Payment/Income

<table>
<thead>
<tr>
<th>School district name</th>
<th>Grade range</th>
<th>2016-17 enrollment*</th>
<th>Gill &amp; Montague student FTE**</th>
<th>GMRSD payment/income***</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amherst Elementary Schools</td>
<td>K-6</td>
<td>1,148</td>
<td>-5</td>
<td>($25,000)</td>
</tr>
<tr>
<td>Amherst Regional Middle/High Schools</td>
<td>7-12</td>
<td>1,358</td>
<td>-5</td>
<td>($41,655)</td>
</tr>
<tr>
<td>Athol-Royalston Regional School District</td>
<td>K-12</td>
<td>1,466</td>
<td>2</td>
<td>$10,000</td>
</tr>
<tr>
<td>Conway Elementary School</td>
<td>K-6</td>
<td>141</td>
<td>-2</td>
<td>($10,000)</td>
</tr>
<tr>
<td>Deerfield Elementary School</td>
<td>K-6</td>
<td>401</td>
<td>-15.6</td>
<td>($86,226)</td>
</tr>
<tr>
<td>Erving Elementary School</td>
<td>K-6</td>
<td>136</td>
<td>5.5</td>
<td>$50,717</td>
</tr>
<tr>
<td>Four Rivers Charter Public School</td>
<td>7-12</td>
<td>220</td>
<td>43</td>
<td>($676,096)</td>
</tr>
<tr>
<td>Frontier Regional Middle/High School</td>
<td>7-12</td>
<td>611</td>
<td>-28.9</td>
<td>($263,427)</td>
</tr>
<tr>
<td>Gateway Regional School District</td>
<td>K-12</td>
<td>841</td>
<td>0.7</td>
<td>$13,543</td>
</tr>
<tr>
<td>Greenfield Public Schools</td>
<td>K-12</td>
<td>1,662</td>
<td>6</td>
<td>$211,333</td>
</tr>
<tr>
<td>Hadley Public Schools</td>
<td>K-12</td>
<td>562</td>
<td>-3</td>
<td>($16,927)</td>
</tr>
<tr>
<td>Hatfield Public Schools</td>
<td>K-12</td>
<td>442</td>
<td>-7</td>
<td>($40,480)</td>
</tr>
</tbody>
</table>
Table 3.2 Continued

<table>
<thead>
<tr>
<th>School district name</th>
<th>Grade range</th>
<th>2016-17 enrollment*</th>
<th>Gill &amp; Montague student FTE**</th>
<th>GMRSD payment/income***</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hilltown Cooperative Charter Public School</td>
<td>K-8</td>
<td>218</td>
<td>3</td>
<td>($37,983)</td>
</tr>
<tr>
<td>Leverett Elementary School</td>
<td>K-6</td>
<td>136</td>
<td>-2.2</td>
<td>($14,361)</td>
</tr>
<tr>
<td>Mohawk Trail Regional School District</td>
<td>K-12</td>
<td>965</td>
<td>-5.3</td>
<td>($66,310)</td>
</tr>
<tr>
<td>Orange Elementary School</td>
<td>K-6</td>
<td>629</td>
<td>1</td>
<td>$12,772</td>
</tr>
<tr>
<td>Pelham Elementary School</td>
<td>K-6</td>
<td>132</td>
<td>-5</td>
<td>($32,047)</td>
</tr>
<tr>
<td>Pioneer Valley Chinese Immersion Charter School</td>
<td>K-12</td>
<td>471</td>
<td>20.5</td>
<td>($266,180)</td>
</tr>
<tr>
<td>Pioneer Valley Performing Arts Charter Public School</td>
<td>7-12</td>
<td>398</td>
<td>3</td>
<td>($46,131)</td>
</tr>
<tr>
<td>Pioneer Valley Regional School District</td>
<td>K-12</td>
<td>867</td>
<td>-19.5</td>
<td>($74,615)</td>
</tr>
<tr>
<td>Ralph C. Mahar Regional School Dist.</td>
<td>7-12</td>
<td>752</td>
<td>2.7</td>
<td>$13,700</td>
</tr>
<tr>
<td>Sunderland Elementary School</td>
<td>K-6</td>
<td>257</td>
<td>-17.6</td>
<td>($119,875)</td>
</tr>
<tr>
<td>Whately Elementary School</td>
<td>K-6</td>
<td>129</td>
<td>-19</td>
<td>($109,693)</td>
</tr>
</tbody>
</table>

* MA DESE School Profiles, 2017  
** MA DESE School Choice Pupils and Tuition, FY17 Final,  
*** MA DESE District Enrollments and Payments to Charter Schools, FY17Q4

Students enrolling in public schools outside the district has a negative financial effect on the GMRSD every year. In 2016-17, the GMRSD had a net negative balance of $1,614,941 from payments to interdistrict choice and charters alone. This does not account for lost revenue to FCTS, which enrolled 5.7 percent of all Gill and Montague students and over 13 percent of all Erving students, and to private schools and homeschooling, which accounted for 6.3 percent of all Gill and Montague students and 3.2 percent of all Erving students. The GMRSD total budget is approximately $21,000,000; therefore, losses to school choice represent a significant proportion.

Practicalities

In addition to the relevant aspects of this case based on the research purpose, it is important to be explicit about the personal and practical reasons for choosing it (Yanow,
2009). I have lived in a town adjacent to the case study site since 2004, and have many personal and professional contacts with individuals associated with it. Its proximity to my residence afforded convenience and access that would not have been possible were the site farther away. My position as a local of sorts (although this label could be contested by individuals with generational ties to the area) helped to establish rapport with participants, and my relative familiarity with local politics and social dynamics provided a level of insight and understanding that would not have been there had I investigated competition in an unfamiliar location.

**Defining the GMRSD System**

As “organized anarchies” (Cohen, et al., 1972), public school organizations are highly complex. As such, I use a systems framework developed by Williams and Hummelbrunner (2011) that allows one to minimize this complexity by defining the boundary, then examining what lies inside this boundary, and how elements are connected. As a sampling strategy, I bounded the system within GMRSD school committee meetings that occurred between July 1, 2016 and June 30, 2017. All topics that arose during these meetings, whether or not decisions were made about them in that context, were included as elements in the system.

While this boundary defines the decision-making system being analyzed, it was necessary to explore outside of this boundary to understand the meaning of specific elements, or to know how and why they entered the system. I considered topics referenced within the boundaries described above as system elements, whether or not they were participants who were physically present, or topics that were directly discussed. For example, the superintendent and director of business and operations regularly reported on district projects at school committee meetings, and recognized individuals for their work or achievements, and I considered these projects and participants as part of the system. I also
considered multiple perspectives on system elements, as this affects how they interrelate. For example, one person’s problem can be another’s solution, or one group of participants may pay close attention to an element that another group ignores completely. Considering various perspectives is also important in terms of how participants made sense of elements and their interactions. This section defines the properties and dimensions of system components.

The first step in analyzing the decision-making system of the GMRSD is to define the properties and dimensions of the system’s boundary, elements, and interrelationships (Williams & Hummelbrunner, 2011). Properties are “the defining characteristics or attributes of a category or concept as ascertained from the researcher’s study and analysis of his or her data and codes” (Charmaz, 2014, p. 34). Dimensions indicate variance in a property. In other words, “dimensions measure, whereas properties describe” (Rich, 2012, p. 5). Defining the properties and dimensions of the components of a system focused the data coding process, and enabled me to map the GMRSD system as a whole in preparation for analysis.

**Boundaries.** According to Williams and Hummelbrunner (2011), setting boundaries is a necessary part of thinking systemically, as it makes it possible to limit complexity to an extent that allows focused analysis. They define a boundary as something that conceptually identifies what is inside the system, and what is outside. The “what” is conceptual and value-laden as it defines relative importance or relevance. Where a boundary is set also indicates power to define what is relevant and important, and what is not. This can have ethical ramifications, as people and ideas can become silenced or marginalized by being defined by those in power as being outside a system’s boundary. This can then contribute to existing social inequities as the system privileges the status quo. Access to decisions is also a boundary issue, as those in power define who can make a decision and who cannot. Boundaries also define which system elements can and cannot interact with each other. In
this case, boundaries may prevent certain problems and solutions from connecting, or encourage certain pairings of problems and participants to interact a lot.

**Elements.** Williams and Hummelbrunner (2011) define system elements simply as “the parts that make up the whole” (p. 16). They leave this concept entirely open-ended and focus instead on how elements and their interrelationships can be interpreted differently depending on one’s perspective. Since I connected systems thinking to the garbage can model, I define the foundation of system elements as participants, problems, solutions, and choices (Cohen, et al., 1972). The following definitions are based on their ideas.

Participants are persons who are attached to a specific choice opportunity at a specific time. They may come and go repeatedly. Participants vary in terms of influence depending on their access to the other elements. Problems are concerns that require attention, and as such are subjective. They are barriers to desired outcomes, things to be changed, overcome, or “fixed.” They are perceived to be uncomfortable or harmful, currently or in the future. One’s perspective determines whether or not one defines a person, place, object, or situation as problematic or not. One person’s problem may be another’s solution, or one group’s benchmark that defines the point at which something is problematic can be in a different place than another group’s. Defining something as a problem reveals norm violations, institutional pressures, and market pressures. Having the ability to frame something as a problem or not indicates power.

Problems and solutions depend on one’s perspective. Problems vary by intensity from minimally uncomfortable/undesirable to extremely harmful or disruptive. The amount of attention they attract from participants ranges from minimal to all-consuming, and this depends on each participant’s perspective. Problems also represent low to high barriers for those who are attempting to solve them. A solution is not a response to a problem, although
it could be. Instead, a solution is an answer actively looking for a question. It is a desired
outcome, product, or state of affairs that exists independently in the system. Solutions are
beneficial by definition, but their benefits depend on one’s perspective (e.g., one person’s
solution might be another’s problem). A solution also varies in terms of disruption to the
status quo, which may cause other problems to arise. As with problems, the ability to frame
a potential outcome as a solution, and to make it happen indicates power.

Choice opportunities are occasions when an organization is expected to produce a
decision that represents the organization as a whole, not an individual, even though
individuals may make the decision. Cohen, et al.’s (1972) model is somewhat vague with
regard to the difference between “choice opportunities” that are elements within decision-
making systems, and what they call “garbage cans,” which are the decision-making systems
that form around major organizational choice opportunities. This is a problem of scale and
complexity. Within these arenas, smaller process-oriented choice opportunities arise and
produce decisions that then contribute to the activity in the arena. A choice opportunity
varies in terms of access, duration, and origin. It is affected by which participants, problems,
and solutions can access it, and this access can affect how long the choice exists. All choice
opportunities do not necessarily produce decisions. Like the other elements, the ability to
frame and create choice opportunities indicates power.

**Interrelationships.** According to Williams and Hummelbrunner (2011),
interrelationships among elements in a system are about the ways in which they connect and
disconnect, and with what consequence. Perspective matters in terms of how these
interrelationships are interpreted and acted upon. They suggest examining the structures that
shape connections, disconnections, and isolations, and the patterns that emerge as the
system develops over time. This can be somewhat difficult in the case of what they call
“massively entangled interrelationships” (p. 19). As is the case with all of the elements themselves, interrelationships depend on power dynamics among them, and that act upon them. They are also subject to external influences from institutional and market pressures.

**Decisions.** In Cohen, et al.’s (1972) model, decisions are generated by the system, therefore, they occupy a paradoxical place as being produced by a system, but also then existing within the system as a new element. A decision is a conclusion or resolution that sets a course of action, or defines a state of affairs. According to their model, there are three types of decision-making processes. Resolution is the process of arriving at a decision after some period of working on it. This is the typical conception of rational decision-making. Decisions may also be made by oversight when they are made using a routine response without any discernible process to arrive at that response, or by flight if they are made quickly at a point when there are no problems attached to them.

**Sampling, Data Collection, and Analysis**

As stated earlier, the primary sampling strategy is to bound the decision-making system within GMRSD school committee meetings during the 2016-17 school year in order to limit the complexity of the system and make analysis manageable. Of course, in a complex organization such as a public school district, the elements that appear within this boundary are a small fraction of the day-to-day decision-making processes of the entire organization. The GMRSD school committee’s online documents provide a representative sample of organizational interactions, and high-level decisions made by the organization’s governing body, as well as a window into other administrative decision-making processes. As an elected body, the school committee represents the link between community stakeholders and the schools. Video recordings of most of these meetings are available online.
I entered the field through a related research project focused on the topic of school decision-making in competitive environments that began in September 2016. I obtained IRB approval and cooperation from organizational leaders at this time, and updated it in October 2017 (see Appendix A). I used a two-phase process of sampling, data collection, and analysis that generally followed the sequence of my proposed research questions. In Phase 1, I identified and mapped the basic elements of the decision-making system using publicly-available GMRSD school committee artifacts (i.e., meeting minutes and agenda packets supplemented by video when available), and a qualitative coding strategy (see Appendix B for a list of artifacts, and Appendix C for sample coding). In Phase 2, I investigated interrelationships between these elements and identified and analyzed potential effects of institutional and market pressures by continuing to refer to Phase 1 data and analysis, and adding new information from additional artifacts, interviews, and observations (see Appendices D-G). I used a targeted sampling strategy to identify data sources that were likely to provide more nuanced understanding of the system elements identified in Phase 1 from multiple perspectives, illuminate power dynamics among them, and check emerging findings. I describe these methods in greater detail below.

**Phase 1: Defining and Identifying System Components and Elements**

The first step was to create a basic map of the entire decision-making system contained within GMRSD school committee business over the course of the 2016-17 school year by identifying to the extent possible all decisions, problems, solutions, participants, and choice opportunities, and their entry/exit timing. This answered the first sub-question: “What problems, solutions, participants, choice opportunities, and decisions appeared in GMRSD school committee meetings and materials between July 1, 2016 and June 30, 2017?”
Before identifying the components, I defined the properties and dimensions of the system components as described next.

**Identifying system elements.** The Phase 1 data set includes all GMRSD school committee meeting minutes, agenda packets, and videos where available (most meetings were recorded, and these are stored in the Montague Community Television’s online Vimeo account) from this time period (see Appendix B). I converted text from meeting minutes into fieldnotes for easier reading, coding, and text searching. Fieldnotes are the bridge between data collection and data analysis. They are the place where “thick description” about physical settings, timing, people, interactions, and so forth is captured (Geertz, 1973). I used a fieldnote template outlined by Emerson, Fretz, and Shaw (2011) that includes columns for description, reflexivity, and ongoing analysis. Each digital fieldnote I created included the event date (and/or retrieval date for artifacts), writing date(s), and links to relevant resources (e.g., original artifacts, associated photographs, websites, etc.). The description column for artifacts primarily consisted of text converted from the artifacts themselves (i.e., I converted .pdf files into text, which I then pasted into the description column and checked for accuracy against the original document). I pasted screenshots of relevant tables or images that did not convert in a usable format into the description columns.

Converting text-based artifacts to fieldnotes created consistency, and facilitated coding and word/phrase searching during analysis. I also frequently referred to the original documents. In the reflexivity column, I wrote notes regarding my personal responses to the data, and reflections on my positionality. In the ongoing analysis column, I documented emerging ideas, questions, and connections as I created, read, and re-read the description column. I added to the reflexivity and analysis columns throughout the entire research process, and also kept personal journals for hand-written notes and ideas. All digital data
were stored in an organized system that was password-protected. Hand-written notes, documents, and journals were stored in a locked filing cabinet to which I had the only key.

To ensure I accurately and comprehensively identified and described the system’s problems, solutions, participants, choice opportunities, and decisions in the school committee meeting data, and the timing of these elements’ appearances in the system, I used a standard qualitative data analysis method that included reading, coding, and interpreting phase one data based on these five deductive categories (Creswell, 2014). While the basic categories were established in advance based on the garbage can model (Cohen, et al., 1972), the process to define each element’s properties and dimensions shifted between inductive and deductive reasoning, and required multiple readings to accurately identify, categorize, and interpret them (Rossman & Rallis, 2012; Strauss & Corbin, 1998). I outlined these properties and dimensions above.

This process included open coding, or what Charmaz (2014) calls initial coding, which is a dynamic and relatively fluid process to discover the properties and dimensions of each category in order to operationalize them and be able to recognize them in the data. The process relies on the “constant comparative method,” which was first developed by Glaser and Strauss (cited in Charmaz, 2014, p. 132), and involves an iterative process of comparing related pieces of the data set to each other to find similarities and differences in order to achieve greater clarity. Once this was complete (although I made small adjustments throughout most of the analysis process as my understanding grew), I engaged in focused coding in which I applied these operationalized categories to the entire data set (see Appendix C for a sample).

This generated a relatively complete and accurate accounting of all elements in the system, which I transferred into a spreadsheet to enable sorting. I ensured any adjustments I
made in later phases were also adjusted in this spreadsheet. After coding for elements, I created deductive categories that included: adult learning and culture; costs, budgeting, and resources; curriculum, instruction, and assessment; governance, leadership, and management; operations and services; parents and community engagement; performance and state accountability; student conduct, social and emotional learning, and school climate; and vision, mission, and values. These categories were loosely based on categories that the GMRSD superintendent used in his Entry Report of February 2014, although I adjusted them based on the topics that appeared frequently in school committee meetings. This enabled me to sort the spreadsheet by categories to look for emerging patterns.

I hand-coded all data throughout this study. Emerson, et al. (2011) cite limitations to computer-assisted qualitative data analysis programs due to the ways in which they tend to lock researchers into early categories, and encourage fitting all data neatly into existing codes. Hand coding is more laborious, but allows one to read and re-read the data set, and become intimately familiar with it (Michael Burawoy, Keynote Address, Unbounding Ethnography Conference, UMass Amherst, November 4, 2016, personal notes). Based on the garbage can model (Cohen, et al., 1972), some of the connections between elements were essential to identify to the extent possible as I mapped the system, including who brought elements into the system, who made decisions, and entry/exit timing. The initial and focused coding processes necessarily entailed analyzing and interpreting the same data from multiple stakeholder perspectives, as this is essential in systems analysis (Williams & Hummelbrunner, 2011). Throughout this entire process, I added to the reflexivity and ongoing analysis columns in the fieldnotes, and wrote analytical memos in digital documents or my handwritten journals in order to create a record of my ideas, interpretations, questions, and
potential analytical themes and directions, and to engage in writing as a method of inquiry (Richardson, 1994).

**Phase 2: Exploring Interrelationships, and Internal/External Dynamics**

Once I had constructed the basic map of the decision-making system using GMRSD school committee meeting artifacts, I turned my attention to exploring interrelations among these elements, and how these interrelationships were affected by internal and external social and political dynamics, as well as institutional and market pressures. This allowed me to answer sub-questions two and three: “How did these elements interrelate?” and “How did institutional and market pressures affect the decision-making system?” This required additional sources of data that I collected through interviews, observations, and new artifacts. The expanded data set included 25 semi-structured interviews with a variety of stakeholders that I identified through targeted sampling strategies (see Appendix D). I directly recruiting easily-identified GMRSD stakeholders (e.g., school leaders, school committee members) whose contact information was available through GMRSD websites, and then through snowball sampling strategies such as identifying other participants based on prior participants’ suggestions or through their voluntary dissemination of my recruiting material (Creswell, 2014; Miles & Huberman, 1994). I also continued to use targeted sampling, and used personal connections or online sources such as LinkedIn to obtain contact information for participants whose perspective I sought. I used an approved recruitment letter and email template to reach out to potential participants (See Appendix E). Interview participants included: GMRSD administrators, school committee members, teachers/staff members, parents, and administrators in other public schools in the GMRSD marketplace. Many participants identified with more than one of these roles, and I interviewed four of them more than once.
Artifacts were essential data sources in this research. This included: GMRSD websites and Facebook pages, published data from 2014 and 2017 surveys of parents who had enrolled their children in other schools, published data from a 2017 survey of current parents, the 2014-17 GMRSD strategic plan, an updated version of this strategic plan for 2016-17, school improvement plans from each GMRSD school, archived videos of school committee events, school committee policies and guiding documents, the 2014 superintendent’s entry report, a 2011 DESE report on the GMRSD’s Level 4 status, a 2009 report by the Town of Gill Education Commission, a 2015 DESE report on alternative practices to school culture and student discipline that highlighted the GMRSD as a case study, two online petitions regarding the TFHS mascot/logo (i.e., one in favor of changing it, and the other in favor of keeping it) including all signatory names and comments, school handbooks and policies; news media; and social media (see Appendix F). I supplemented these data with publicly available school enrollment, accountability, and financial data; census demographic data; and geographic data. Weiss (1998) reminds us that while alternate sources of data are a relatively efficient way to extend the reach of data collection, it is important to recognize that these sources of data were collected for purposes other than this research. To the extent possible, I downloaded or copied all online artifacts, and transferred them to fieldnotes for easier keyword searching.

I observed public events that included a GMRSD school committee meeting, a public debate on lifting the cap on charter schools in the state, a community forum on the topic of changing the district’s high school mascot/logo, and a high school football game. I chose these events based on their connection to organizational decision-making and highly politicized issues (i.e., the high school mascot and charter school policy). I captured setting data by driving around the geographic area, and walking around GMRSD buildings and
grounds (see Appendix G for a list of additional fieldnotes not associated with other artifacts).

I continued to use the iterative data collection, analysis, and interpretation process described in Phase 1 based on additional deductive categories in my conceptual framework to answer the subquestion, “How did these elements interrelate?” Based on my conceptual framework, I looked for connections and disconnections among elements, participant attention, and evidence of deliberation, flight, and oversight in decision-making. I looked for the ways in which power was employed, by whom, for what purpose, and with what consequence. As in Phase 1, I also used an inductive data analysis and interpretation process to surface patterns, generate themes, develop alternate understandings (Charmaz, 2014; Rossman & Rallis, 2012). This phase was more focused on analytical memo writing than on coding, which assisted me in developing an understanding of patterns among elements.

**Ethical Considerations**

I engaged in efforts to inform, protect, and benefit respondents that are based on the ethical principles of beneficence, respect for persons, and justice set forth in the U.S. federal government’s Belmont Report (Singer & Levine, 2003, p. 150). Ethics can be categorized as procedural ethics that are established ahead of time and proceed (hopefully) as planned, and “ethics in practice” that involve ongoing consideration and sensitivity to “ethically important moments” (Guillemin & Gillam, 2004). These include obtaining ongoing informed consent as a study progresses, and respecting participants’ autonomy if they change their mind about any aspect of participation. I conducted all aspects of this research myself, including sampling, data collection, and data analysis. I obtained IRB approval in October 2016 for a related research project, and renewed and revised the protocol as necessary. Any computer or electronic device hosting and/or storing electronic study records, including audio
recordings, fieldnotes, and digital artifacts had password protection to prevent access by unauthorized users. Only I have access to these passwords. All material study records, including paper documents such as signed consent forms, handwritten notes, and journals, were kept in a locked file cabinet to which I had the only key. No other persons had access to these files. All interview participants signed an informed consent form prior to the interview that made it clear that they could leave the study at any time. I only audio-recorded interviews with explicit permission from participants.

In my data collection activities that occurred from September-December, 2016, my stated intention was to keep the name of the school organization anonymous, and the informed consent form reflected this. After careful consideration, I decided to reveal the name of the school organization going forward due to the fact that highly-publicized events that occurred during the 2016-17 school year would make it impossible to maintain district anonymity. In order to use prior data obtained under the assumption that the name of the school district would remain anonymous, I contacted prior interview participants to obtain new permission to use their data using a revised informed consent form (see Appendix H).

For many of these participants, their personal identity is likely to remain anonymous despite revealing the name of the school organization (e.g., a parent or teacher, of which there are many). For others (e.g., the district superintendent and secondary principal) their position is likely to disclose their individual identity. I did not use any data for which the participant was unwilling to provide informed consent. In writing up the findings, I took care to identify sources of information in ways that were accurate, but would not unnecessarily identify the particular source (e.g., a school committee member who was also a parent may be identified as a parent in order to prevent identification of the source). I did not need to obtain consent to use publicly-available data (e.g., statements that appeared in
school committee meeting minutes or on social media). All material and digital records that contain personally identifiable information will be destroyed or deleted three years after the close of the study. The GMRSD superintendent of schools gave his approval to engage in the research under these conditions.

Qualitative research relies on adherence to “ethics in practice” to ensure that the researcher is making sound decisions about the day-to-day ethical dilemmas that arise while in the field (Guillemin & Gillam, 2004, p. 262). In addition to the signed consent form at the outset of an interview, I had a responsibility to establish ongoing informed consent by reminding participants of their primary role—as opposed to a friend, community member, or co-worker—over the course of a study. This is not as straightforward as it might seem, as there is tension inherent in developing relationships with participants, and also actively reminding them of one’s researcher status (Allen, 1997). I attempted to recognize and strategically address potential power imbalances between myself and participants related to race, gender, employment, socioeconomic status, and the like, as these could cause ethical dilemmas, as well as skew findings (Etherington, 2007; Hemmings, 2006). If knowledge is a social construct, then qualitative inquiry must consider the ethics involved in how the researcher makes meaning within the context of the entire research endeavor.

**Positionality and Reflexivity**

My professional experience as an educator and lack of personal experience as a parent may have influenced the ways in which I was perceived in the field, as well as the ways in which I interpreted data. For over a decade, I worked in a charter public school near the GMRSD, although it is far enough away that it is not a significant competitor (e.g., three GMRSD students enrolled in 2016-17). I worked from July 2015 to June 2018 for a state-level not-for-profit charter school support organization. These connections may have
influenced how people reacted to me, or caused them to make assumptions about my motivations or beliefs, which could have biased my data collection. I was transparent and forthcoming with all of my research participants about my professional experiences. I consider myself an advocate of family access to different types of schooling options—as advantaged ones have always had—and know that there are barriers that prevent students from accessing choices within the current system. In my professional role, I am attuned to dominant narratives that seek to divide, scapegoat, blame, and otherwise generate political conflict between traditional public school and charter school sectors, and this may have influenced how I analyzed and interpreted data. On this point, I was especially vigilant in my reflexivity.

Despite my outsider status, my physical presence as a white, upper-middle-class woman in her late forties allowed me to be accepted by GMRSD organizational members who do not know me. For example, on the day of my first official site visit in fall 2016, I entered the school without signing in, talked to people in the office about visiting a friend who worked there, and was told I could go find her. No one asked my name. This is highly unusual for public schools that typically have strict sign-in procedures. On other fieldwork occasions, people assumed I was a parent. When I stayed late at a school committee meeting after most of the audience had left, people asked me afterward which newspaper I was reporting for. My assumption is that I am interpreted as someone who belongs in this school setting due to my appearance, and behavior, even if my specific role is unclear. This provided significant access to school sites and events, and reduced personal barriers when first meeting people.
Limitations

Validity is the extent to which research explains what it is intended to explain (Weiss, 1998). This research is focused on how decision-making occurs in a traditional public school organization in a competitive environment. My priority was to consider the pressure aspect of market-based competition, in combination with existing institutional pressures, as opposed to any technical aspects of what competition is and how it functions. My conception is that competition is a form of pressure that affects processes in the system, and that market pressures act similarly to institutional pressures in terms of building legitimacy. A limitation of this study is that it does not consider specific attributes of competition that may affect the system differently than other types of institutional/market pressure. Another limitation is that school committee meetings, while perhaps considered by many as the site of “real” decision-making (Rallis & Criscoe, 1993), represent a small slice of the thousands of decisions and organizational interactions that transpire every day in a public school setting. My initial sampling strategy—bounding the system within school committee meetings—biases data collection and analysis toward this public face of the organization.

This study design contains some limitations related to my positionality as an education professional, school administrator, and charter school associate, as well as my gender, race, and class. My association with the charter school sector is something I continued to be reflexive about as I collected and interpreted data. In many ways, I represent the competition many GMRSD stakeholders feel is unfair and detrimental to their schools. In several instances, this potential barrier provided a perfect opening for honest discussions about how complicated school choice can be, and I believe these conversations allowed me to build trust with my participants.
Chapter Summary

The intent of this proposed study was to analyze a school organization’s decision-making within the context of a high accountability/high competition environment. I chose the Gill-Montague Regional School District as a critical case that is subject to both of these conditions, and is also experiencing shifts in its student population that exacerbate these pressures. I engaged in this analytical work by using a systems approach to examining the decisions that appeared in GMRSD school committee meetings and events during the 2016-17 school year. I built a map of the system using Cohen, et al.’s (1972) garbage can model, then described and analyzed interrelationships and power dynamics among system elements, and evidence of the effects of institutional and market pressures. The garbage can model provides a framework that does not assume rationality, and does assume political conflict and societal influences. The resulting detailed exemplar of an actual school organization’s decision-making processes over the course of one year elucidates the problematic nature of expectations that centralized accountability requirements, coupled with intentional increases in market-based competition, will generate the predicted improvements with regard to school performance and student achievement.
CHAPTER 4
MAPPING AND CONTEXTUALIZING SYSTEM ELEMENTS

Introduction

This chapter describes the elements contained in the GMRSD decision-making system. I begin with a description of organizational leaders, as these individuals were the primary participants in the system. I provide a summary of all decisions made during the 2016-17 school year, and provide details about social, political, and historical context that surfaced during my data collection, which allows greater understanding of the system dynamics that resulted in these decisions. I then identify and describe the primary system elements—trends, issues, and dilemmas that garnered participant attention—many of which had been active in the system in past years.

The most prominent issue that surfaced in 2016-17 was consideration of the high school’s mascot, the “Indians,” which revealed deep cultural factions within the community. I describe two additional participant groups that I term “localists” and “regionalists” that were highly engaged in decision-making during the year on either side of the mascot debate. This chapter lays the groundwork for a deep exploration in Chapter 5 of the ways in which these elements interrelated during decision-making activity.

Organizational Leaders as Primary Participants

Organizational leaders in the GMRSD include an elected school committee, the superintendent of schools, and the administrative team. In concert, they are responsible to manage all of the day-to-day activity of the organization, and to ensure it is meeting external policies and requirements. The overall survival of the organization is in their hands, and they are also highly visible stakeholders that are perceived to have a high degree of authority and control over decision-making. In addition, the district has a unique relationship with a
partner organization called the Gill Montague Community Schools Partnership (“The Partnership”) that writes grants to provide training and support in the schools around students’ social and emotional learning. Partnership staff members also act as organizational leaders in this capacity. This section describes these individuals and their perspectives.

The GMRSD School Committee

The GMRSD is governed by a nine-member school committee comprised of six residents of Montague, and three of Gill who are elected by residents of the two towns. The school committee conducts its business in public meetings twice per month during the school year and once or twice during the summer months, and is subject to Massachusetts open meeting law. The committee encourages input from the public during a public comment section at the start of every meeting, through informal forums, and via email or telephone with individual members.

From July 1, 2016 through the May 15, 2017 election, the school committee was comprised of nine individuals who brought a wide range of skills, expertise, and perspectives depending on the duration of their time on the committee, parent status, alumni status, educational background, and so forth. Members included the following individuals:

**Mike** (chair) was a Montague resident in his fifth term, and had been the chair on and off for that period of time. His adult children attended GMRSD schools. He was a carpenter and woodworker by trade, and was also on the board of Montague Community Television.

**Sandy** (vice chair) was a resident of Gill. She had been on the school committee for several years, and was the chair for most of the 2015-16 school year.

**April** (secretary) was a Montague resident in her first term. She grew up in the town, attended GMRSD schools, and had children in the schools. She had been an active school council member for two different GMRSD schools during their School Improvement Plan development processes in 2015.

**Christina** (assistant treasurer) was a Montague resident in her first term. She had children in the GMRSD schools. She worked as an administrator at a pre-school in Gill for several years before transitioning to work as a realtor for a local real estate
Heather was a Montague resident in the first year of her first term. She had children in the GMRSD schools. She has a degree in engineering, and had worked as a mathematics teacher in a variety of public schools. She also worked as a self-employed photographer.

Jane was a Gill resident and retired elementary school teacher in the district. She had been on the school committee for several years, and was the GMRSD representative to the Massachusetts Association of School Committees (MASC) in 2016-17.

Lesley was a Montague resident in her second term. She grew up in the town, attended GMRSD schools, and had children in the schools. She was trained as an early childhood educator, and supervised teacher practicum students enrolled at the University of Massachusetts Amherst.

Marge was a Montague resident who lived in the village of Lake Pleasant. She ran a company that coordinates produce distribution between local farms and retailers. She voluntarily vacated her seat in May 2017 after the election due to personal obligations.

Timmie was a resident of Gill, and was in her first term back after a six-year break. She served for seven years prior to that. She was also a member of the Gill finance committee. One interview participant described her affectionately as the “self-appointed fiscal hawk” of the school committee.

The fact that these participants are individuals is significant; each brought his or her own world view and priorities to the table. However, they functioned as a single unit in this context, especially with the support of the superintendent, and through the efforts of the chair.

Other individuals regularly participated in school committee meetings as non-voting members. Up to three representatives from the town of Erving are allowed due to their contract with the district to educate students in grades 7-12. In 2016-17, Marisa was the sole Erving representative. She was rarely present at meetings, and primarily acted to advance her own interests regarding the Indians mascot when she did participate. There is always a non-voting student advisory representative from the Turners Falls High School student council whose role is to serve as the voice of the secondary school’s student body. School committee
meetings regularly include the superintendent, the director of business and operations, and the executive secretary. The superintendent is responsible for all organizational leadership, oversight, and management, and is the primary contact to the school committee, who in turn supervises and evaluates his work and performance. The director of business and operations is responsible for district finances, operations, and human resources. These individuals do not vote, but they make most of the day-to-day organizational decisions about teaching and learning, operations, and finances, and make recommendations to the school committee that carry a lot of weight. The executive secretary is responsible to assemble and distribute agenda packets, announce meetings, take minutes, and post all meeting materials on the district’s website. The individual in this position changed in October 2016 due to a retirement.

The school committee has published operating norms that define how they conduct their work. They state, “As advocates for public education, our primary responsibility is to represent and support the needs and interests of the children of the Gill Montague School District. We serve all stakeholders in the community and the school system.” They articulate their adherence to all laws and regulations, including open meeting law, while providing “a model for responsive, respectful and civil adult behavior for our students.” This includes treating people with dignity and respect, active listening, professional conduct, and a focus on facts and data as opposed to personal feelings. They claim to set goals that are focused on policy and student achievement, and monitor their progress using data. The chair indicated to me that these norms are espoused, but not always enacted. He complained that the school committee does not hold anyone accountable to them. He said, “We carry them to all the meetings, but never look at them, and never talk about them,” and recognized that this was his responsibility and an emerging area of growth (interview, November 2016).
A notable departure from past practice in 2016-17 was the level of unity among organizational leaders. The district had experienced a decade or more of unstable administrative leadership with a seeming revolving door of superintendents and principals, and inadequate staffing in the central office. In addition, the school committee was comprised of individuals who acted primarily in their own interests and engaged in open conflict. The 2016-17 school committee chair was working to improve relationships and ensure equitable opportunities for voice. He also spent time collaborating with the superintendent. Their 2016-17 goals reflect this level of commitment to working collaboratively, and they were successful in doing so for the most part as evidenced by the respectful dialogue and mutual support that characterized their work during the year, even around highly contentious issues. All of the members with whom I spoke indicated a high level of trust in the superintendent and the administrative team, and that this supported their attempts to do their best work as a functioning governing body. I provide greater detail about administrative team members later in this section.

Interview participants reported to me that there had been decades of relationships within the school committee that they characterized as “toxic,” “poison,” and “manipulative” (interviews, November 2016, April 2018). Much of this appeared to have centered around a particular member who held the chair position for approximately half of her tenure over almost twenty years. A current member who had worked with this person for years described her as being driven by her own personal agendas, most of which were about increasing her level of control over others. The current chair described her as a “recruiter” who would get people on the school committee who would support her ideas. In the context of talking about how the district had not had a strategic plan for a long time, the chair explained, “She selected [school committee members] strategically. She
had a strategic plan! She just didn’t share it with the district” (interview, November 2016).

He explained that her recruits were not selected for their ideas, and were actively discouraged from expressing their opinions, or disagreeing with her. I asked, “What were her decisions based on?” He replied, “Being in charge.” He told me that she was opposed to hiring the current superintendent because she had someone else in mind whom she thought she could manipulate. Without me mentioning the chair’s statements, another member also told me that this person regularly recruited people to run for school committee whom she thought she could easily manipulate, and that some of them had figured out her modus operandi only after getting burned (interview, November 2016). School committee members claimed that some of the conflict on display in the past was due to damaged relationships that had resulted from people being resentful after figuring out that they had unwittingly been used as pawns in her quest for control.

This controversial person was regularly referenced in my interviews. In another instance, a school committee member was describing current member interactions outside of meetings to me, and explained that they were “definitely not supposed to tell people how to vote, but this sort of thing used to happen a lot,” and then referenced this person (interview, April 2018). The following excerpt is from a fieldnote in which the chair described the former power dynamics:

He says, “This was a person who had to be chair, and once they were chair, they did everything. Nobody else did anything.” He clarified by saying she made it so she was the one to make all the decisions. “So you’d have an interesting discussion at one meeting, and you’d come back to the next meeting, and the decision had been made. And you wonder…how did that happen?” He goes on for a while about her personal characteristics that were not conducive to a well-functioning board, such as her tendency to finish everyone’s sentences, and act like she had all the information. “I had one member, though they voted for this person every time they ran [for chair], came up this year and it was like PTSD. She was, like, afraid to talk in the meeting. [very quiet whispering] ‘Is it OK if I say this?’ I ask why this person voted for the chair every time, and he replies, “Well, if you look at the dynamics of domestic abuse, and power arrangements, people get sucked into that, but these are…like the
one school committee member, someone who’s been here forever, and the other one has been here forever…knows her parents, knows her aunts and uncles, so it’s like using influence wherever possible…did a lot of stuff behind the scenes, was in the buildings all the time, talking to the teachers, ‘Oh, I can get you that, and I can get you this.’ It was just poison…poison, poison, poison. […] So, one year the thing came up about the [different process to decide the] budget, and it was not allowed on the agenda. The next year I was chair, and all I did was put it on the agenda. And it passed 8 to 1.” I ask why it wasn’t on the agenda before, and he says, “It wasn’t her idea.” He says that his intent was to get people to talk about it, not necessarily to get everyone to agree to it. He explains that the board hadn’t changed in composition, yet the votes were not split the way they were when the prior chair was in place. He says that her control stemmed from having enough people to vote the way she wanted every time in order to get her preferences passed. This is when things went to a vote at all, as she wouldn’t include anything on the agenda that she didn’t want to pass. (interview fieldnote, November 2016)

This illustrates power dynamics that had existed on the GMRSD school committee for many years prior to the superintendent’s arrival in 2013.

I assured my interview participants that I would not connect their names with any of these negative comments about a colleague, but some were not concerned, saying this was all public knowledge. When I investigated, it became apparent that social tension between school committee members had been on full display to the community in years past. For example, in July 2015, there was a comment in the meeting minutes that “some members felt coerced and/or intimidated by other members and felt they had to be quiet.” In September of that year, a visitor made a statement that was recorded in the minutes as “Let’s not be disagreeable. We can disagree, but not be disagreeable.” Later on, those same minutes state, “Spirited discussion ensued on a number of topics related to the negotiating committees/5 minute break/More spirited discussion.” No other details were included.

An online video of that meeting shows heated exchanges over procedural issues related to appointments to the teachers’ contract negotiation committee. At the next meeting, a community member who had been in attendance at the prior meeting was recorded in the minutes as having said that:
He was appalled at the infighting and disrespect he saw among members. He reminded members that they should be role models for children in the district and as representatives for the community they need to conduct themselves with decorum and respect.

In March 2016, a school committee member shared at a meeting printed copies of emails from the chair that she felt were bullying and harassing, stating she wanted them on record.

The current chair explained that he had also been part of this ongoing dynamic. He said,

There was real adversarial energy, and I wasn’t gonna do that again. I mean, I contributed. I wasn’t like, “It woulda been great if everyone else hadn’t been a jerk.” I made mistakes too, and needed to learn a lot about [...] the structure. How do we use the structure well? (interview, November 2016)

He said he had learned that “the chair is not the CEO” (interview, March 2018), and described his efforts to help everyone figure out how to do what they all want to do, and to work collaboratively with the superintendent. These efforts represent organizational work to change the perceptions of the community about how leaders behave with each other. In 2016-17, they tended to present as respectful overall. The superintendent speculated to me that external pressures on the committee served to unite them (interview, March 2018).

**The GMRSD Superintendent**

The superintendent was hired in mid-2013 after several years of rapid turnover in this position (he was the fifth superintendent in seven years). His arrival signified a significant shift in organizational functioning due to his professional expertise and relational skills. He stated in his entry report, “Stakeholders frequently observe that the lack of continuity of district leadership has contributed to shifting priorities, fluid expectations, inconsistent organizational procedures, and a lack of strong, trusting relationships” (February 2014). The turnover had resulted in an organization that lacked vision, as well as consistent systems and structures. In an interview with him, I mentioned district efforts I had noticed to clean up accounts, codify practices, and create policies and procedures
manuals. He said to me that this was a significant portion of their work for the first few years of his tenure as inconsistent leadership had resulted in “a garden that [had] been unweeded for too long” (interview, March 2018). He also lamented that this work had nothing to do with teaching and learning.

As an administrator and manager, the superintendent was focused on organizational learning, and to using an evidence-based approach to decision-making as opposed to instinctive or emotional responses. In his entry report, he observed that the Accelerated Improvement Plan had pushed the district to collect data solely in order to meet compliance requirements, and not to advance organizational learning. As a result, he said, “the district ended up measuring things that were easy to measure like lesson plan submission rates and the number of pieces of evidence submitted for evaluations rather than in providing extended training, targeted feedback, and celebrations of meaningful successes” (February 2014). He saw data as a means to an end, not an end in and of itself.

One of the district’s strategic plan categories that grew out of this entry report was “Learning Organization,” which sought to “create a culture of adult learning driven by goal setting, feedback, collaboration, and accountability” (2014-17 GMRSD strategic plan). This described inquiry-based sequence perfectly expresses his approach as a manager and district leader. In another strategic plan category, “Performance-driven Curricula,” it states that one initiative was to “provide time for teachers to collaboratively develop and revise curriculum maps based upon actual experience, not just hopeful outcomes.”

One school committee member told me that the superintendent’s comfort with data was one of the appealing aspects of his candidacy, as well as his highly relational approach and calm demeanor. She said they liked that he was a “data guy” (interview, October 2016). He consistently referred to data as a means to check his own progress, as well as others. For
example, he provided measures for each of his 2016-17 goals (e.g., “classroom observations will show an increase in the degree to which students are engaged in tasks requiring analysis, synthesis, evaluation, and judgment of information and concepts”), trained teachers to revise their instruction based on measured student progress toward learning targets, and suggested collecting college persistence and success data for graduates (SC minutes, September 2016).

He pressed principals to create measurable goals on their School Improvement Plans. For him, this not only matched his tendency to think logically, but also was a means to create clear objectives, and then to measure progress against those objectives. Data gathering may not seem to be unusual for a public school district superintendent, but this inclination was remarkable considering the district’s history of leader turnover and inattention to details.

The superintendent’s core values and beliefs affected all aspects of organizational functioning. He shared them early in his tenure in his entry report, “Integrity: adherence to a set of principles; Consideration: continuous and careful thought; thoughtful and sympathetic regard; Learning: The ability of individuals and groups to grow—to understand and act upon new knowledge” (February 2014). They were revealed as skills and attributes that included a penchant for accuracy, consistency, and transparency, an ability to listen empathetically and understand diverse perspectives, a belief that durable change is based on learning, and a commitment to social justice and equity. These core values became embedded in the district’s values statements and strategic plan, which also illustrated the superintendent’s progressive philosophy of education that was grounded in a belief in the power of project-based learning and authentic performance assessments. This stood in contrast to prior superintendents and principals who used test preparation strategies to improve district performance.
I originally connected with the superintendent when I reached out to him to participate in another research project in 2014. At the time, he indicated interest in learning more about my former arts-based school’s approach because he was trying to “sell” a more performance-based approach to curriculum and instruction in the GMRSD, which had developed a narrow test preparation approach during the years of the state-led improvement plans. At that time, he said that one of his children had attended a school that used a project-based, arts-integrated approach and, “I’m always thinking about how we can bring those [approaches] to scale in a public school setting.” He added that his priority was “teaching with depth instead of breadth” (interview, September 2014). A teacher relayed to me a conversation she had with him during an “instructional round” in which a group of administrators and teachers were observing in classrooms. She said he was talking about how he was working hard to get teachers to shift away from a focus on standardized tests, and he exclaimed jokingly, “What do I have to do, light myself on fire? It’s not about the MCAS!” She laughed and said she always remembered this because it told her that he was interested in students as people, and not just about their test scores (interview, October 2016).

The GMRSD Administrative Team

The entire administrative team active in 2016-17 had been hired by the superintendent. In addition to the director of business and operations, and the executive secretary, the central office team included the director of pupil services, who oversaw special education and related services, the director of teaching and learning, who oversaw curriculum, instruction, and assessment, the food services coordinator, and the director of information technology. The administrative team also included four school-based principals: a secondary principal for Turners Falls High School/Great Falls Middle School, and one principal each for the Hillcrest, Sheffield, and Gill Elementary Schools. They were
responsible to oversee the teachers and programs in their schools, and report to the superintendent. Sheffield ES and the secondary school also had assistant principals who were responsible to assist with program implementation, school culture, and student discipline.

The administrative team shared the superintendent’s commitment to social justice and equity, and this was a guiding philosophy of their work. For example, I asked the secondary principal if it would be accurate to assume that the superintendent’s theory of action was that addressing students’ social and emotional learning (SEL) would lead to improved academic performance, as this had become apparent to me in reviewing strategic planning documents, and in conversations with him. She referenced a conceptual framework based on “the three R’s” of “Rigor, Relevance, and Rigor” that he had laid out in his August 2016 welcome letter to families (this was posted on the district’s Facebook page), and said,

Not exclusively. [...] Student teacher relationships, and SEL is critical...so [administrators] talk about Relationships, Relevance, and Rigor as three pillars, and I think social-emotional learning...in some ways it’s really difficult to slice and dice these things apart from one another, but I think there’s definitely a working assumption that attending to social-emotional learning needs, and building strong staff-student relationships is an essential part of school improvement, and that’s really where the social justice stuff that we were talking about earlier grows right out of that. But I think we also see that our definition of rigor would include...and relevance, like we can’t say that we’re teaching for relevance if we’re not teaching a curriculum that’s representative of the students in our district, and we can’t say that we’re teaching for rigor if we’re ignoring issues of equity and issues of oppression. (interview, March 2018)

She confirmed that the superintendent brought this philosophy with him to the district, and that this informed his selection of administrators. She then connected this to the idea that this approach to education was based on a common belief among the administrative team that “this will make a difference in our test scores, but not in a way that’s gonna be visible overnight” (interview, March 2018).
Interview participants, from teachers and staff members to parents, were highly complementary about the superintendent and administrative team. For example, a parent with three children in the schools said, “It makes a big difference having set people in place. I can tell you as a parent that there’s a big difference in the schools” (interview, March 2018). Another participant who had children in the schools said that there was true “ownership” by the principals and district leaders. She said, “Now we have principals who take ownership of their buildings. They walk in the building and clean up the trash as they walk in...know what I mean?” (interview, April 2018). This statement was a somewhat tongue-in-cheek illustration of the depth of their commitment, and was said in contrast to prior principals who were perceived to be either structurally disconnected by overseeing two schools in different buildings, or relationally disconnected by virtue of their short tenure. A new staff member commented to me on how much she appreciated the school and district leaders, and described this as having “really good cogs in the wheel” (interview, October 2016).

The superintendent said to me that he felt like the 2016-17 school year was “Year 1” of a new start for the district because they finally had all the right people in place (interview, March 2018). The administrative team supported the superintendent in spreading his ideological influence throughout the district, and the school committee’s trust in him allowed this to occur. This level of unity resulted in organizational leaders effectively functioning as a single element within the GMRS system, as opposed to independent participants with their own agendas, as had occurred in the past.

The Partnership

The GMRS has a unique relationship with a not-for-profit organization called the Gill-Montague Community Schools Partnership, or “The Partnership” as they are commonly known, that shares space in the central office building. According to their website, they
“support a wide variety of school- and community-based initiatives and act as connectors and liaisons to numerous organizations that serve youth and families in our region” (http://gmpartnership.org/). Two part-time staff members run the organization, and work in the GMRSD schools. The project director started work in the district as a peer mediator in 2005, and had built the organization slowly since 2008. She was a strong proponent of Restorative Justice as an approach to student discipline and school culture. She worked with GMRSD staff members to develop and implement SEL curriculum, assisted with student-led advisories, and co-advised the TFHS Gay-Straight Alliance. The Partnership’s coalition manager had worked with her since July 2015. She was equally committed to this approach to education. Together, they applied for grants to fund programs and staff training in the GMRSD schools in close partnership with district personnel.

Overview of System Decisions in 2016-17

As a framework for later analysis, this section provides an overview of organizational decisions that occurred with the GMRSD system during the 2016-17 school year. Aside from voting to approve meeting minutes, to adjourn each meeting, and to move into executive session, the GMRSD school committee voted over ninety times from July 1, 2016 to June 30, 2017. In addition, their meetings contained evidence of organization-level administrative decisions. This section is organized by decision topic. Where it was possible to discern, I indicate the extent to which these decisions were made through a deliberative process, or if they were more routine.

Planning and Goal-setting

Over the summer of 2016, the GMRSD school committee developed goals for themselves that were focused on supporting students and building relationships with stakeholders. The superintendent and administrative team updated the district’s strategic
plan for its final year. They removed initiatives that had already been accomplished (e.g., creating curriculum maps), and emphasized a focus on social justice education and multicultural and diversity awareness. In September, the school committee approved goals the superintendent had drafted for himself. They included: improved student reading skills at Sheffield Elementary; critical thinking across the curriculum; increased teacher leadership capacity; increased community engagement; increased fiscal sustainability; and increased understanding of how to promote a multicultural, social justice, and active citizenship perspective in the teaching, learning, and work of the district (SC minutes, September 2016). Each of these goals was specifically correlated to the updated strategic plan, and were connected to problems and solutions that appeared in the district prior to 2016-17. The school committee typically evaluates the superintendent in May. Upon his request, they voted to conduct his review in August in order to make room for other priorities.

The High School Mascot

In the spring of 2016, a group of Montague residents approached the superintendent and school committee to ask them to consider changing the TFHS mascot, the “Indians,” claiming it was a racist stereotype. Over the summer, the GMRSD school committee decided to take on this issue, and it became the focus of most system activity during the 2016-17 school year. They voted on a three-step consideration process that the superintendent and school committee chair had drafted to: 1) “Learn Stakeholder Interests” through public forums and educational events, 2) “Develop a Mascot Selection Process” by developing criteria and requesting proposals; and 3) “Select a Mascot” by school committee vote on submitted proposals (which they assumed would include the existing Indians mascot).

In October and November of that year, the school committee voted on a format and ground rules for two public forums at which community members could make short
speeches about their ideas and opinions on the Indians mascot, as well as the format for a
set of inquiry events in which speakers with “specialized knowledge about this issue are
invited to make a presentation to the committee followed by a question and answer period
with you so that you may gain a more in depth knowledge concerning the facets of this
complex topic” (SC minutes, October 2016). Topics included: pre-Colonial local Native
American history and culture, local Native American representatives sharing their
perspective on the Indians mascot, citizens speaking on the meaning and importance of the
Indian mascot, and an academic presentation on the nature of stereotypes, prejudice, and
oppression. They held these forums and inquiry events from October through January. They
also arranged educational events and a school committee forum for secondary students.

In the midst of community tension around the mascot debate, there was an incident
at the annual “Turkey Day” football game where students did the “Tomahawk Chop” (an
up-and-down chopping motion done with a straight arm) and sang the “war chant” used by
the Florida State University Seminoles. These GMRSD traditions had been banned in 2009
by a prior school committee. In response, the superintendent and school committee
reviewed the 2009 vote, which showed that the chop and chant were defined as “offensive
and not in compliance with Anti-Discrimination Policy,” but that the ban only applied to the
“marching band or the cheerleading squad while representing the school.” This policy was
clearly problematic, and the school committee promptly voted to clarify that they defined
these actions as discriminatory and off-limits for any school group, effectively settling the
matter going forward.

In mid-January, a member of the school committee stated that the process had
become increasingly stressful and divisive for the community, and suggested that they move
the process forward as quickly as possible. The committee eventually voted to reverse the
prior vote on the mascot decision-making process. Then the school committee voted six to three at the February 14 meeting to remove the Indians mascot and continue the process to select a new one. Of those who voted against it, two explained that they were opposed to changing the process they had originally communicated to the community, and were not necessarily in favor of keeping the mascot, and one said that they should wait for the results of the town referendum. Over the spring, the school committee resumed their original process by discussing and voting on mascot criteria. They voted at the end of June to create a task force comprised of a range of stakeholders (school committee members, students, parents, and community members), that would take on the new mascot proposal and decision process. The intent was to create an inclusive process that would cultivate community buy-in for a new mascot.

**Budgeting and Resources**

With regard to budgeting, the school committee regularly voted to approve transfers between line items in the district’s current budget. The school committee voted to participate in the state’s Interdistrict School Choice Program, as they did every year, in order to accept students from other towns and receive some tuition income. They engaged in contract negotiations, and brought contracts for all bargaining units, plus the principals contract template, to the full committee for approval. The superintendent and director of business and operations worked with the administrative team in the second half of the year to design the operating budget for the coming year. The school committee voted to approve the preliminary budget, which was sent to the towns for approval, and then to approve the final budget in May.

To obtain additional resources, GMRSD administrators and Partnership staff engaged in grant writing to support food services and equipment, and educator professional
development in the areas of literacy instruction, hands-on science curriculum development and instructional strategies, educator collaboration, social justice education, and supporting students affected by trauma. The secondary principal wrote a large grant late in the year to fund the planning of a high-school redesign that would create alternate pathways to graduation. All of the grants mentioned in school committee minutes were awarded to the district. In addition to grants, they voted to accept a large donation for changes to the mascot that had been raised through a GoFundMe account set up by a former teacher.

**Staffing**

The GMRSD created positions, modified positions, and hired individuals in salaried and subcontracted positions during summer 2016. Over the summer, the superintendent finished assembling the 2016-17 administrative team by hiring a new principal at Gill ES (he had been working as a grade 6 teacher at GFMS for the 2015-16 school year), and assistant principals at Sheffield ES and GFMS/TFHS. Other hires included a licensed practical nurse (LPN), a registered nurse (RN), two teachers, two literacy coaches, and a speech and language pathologist assistant. None of these positions were new, but the LPN position replaced what had been a second RN position in order to save money. In contrast, the school committee voted to increase pay and/or hours for three positions in order to be competitive and avoid losing qualified personnel: district treasurer, substitute nurses, and a facilities manager. The school committee voted to retain the services of a district lawyer and a school physician, both of whom had worked with the district in the past.

**Teaching and Learning**

The superintendent and administrative team supported teachers and other staff members to implement curriculum that had already been in place. There were no new decisions in this area. The director of teaching and learning worked with principals and
teachers to continue to increase the diversity of curricular materials, in line with the strategic plan's initiative to support social justice education, and multicultural/diversity awareness. The administrative team read and discussed a book over the summer called *Culturally Responsive Teaching and the Brain*. Teachers and staff members engaged in training on social justice and multicultural awareness. Partnership staff trained GMRSD staff in trauma-sensitive practices (i.e., practices that are effective for students who have experienced multiple adverse childhood experiences, and have unique learning needs), and worked with a group of secondary teachers and school counselors over the course of the winter and spring to develop systems and practices to build “safe and supportive schools.”

The superintendent and secondary principal attended a conference sponsored by the Coalition of Essential Schools to learn more about progressive educational models and to network with other progressive educators. Teachers and administrators attended professional trainings on literacy instruction sponsored by DESE, as well as a training on educator collaboration. Principals and the superintendent continued to support teacher leaders in facilitating collaborative work among teachers that was focused on student learning and progress. In March, they began to engage in the grant-funded collaborative science curriculum project in collaboration with the Four Rivers Charter Public School.

The school committee of most traditional public school districts is typically less involved in teaching and learning initiatives, and this was also the case in the GMRSD. The school committee voted to approve four student field trips, as was required by policy. At two meetings in March, principals reported to the school committee on progress toward their School Improvement Plans, and current school initiatives. All of them focused on efforts in their schools to support students’ social and emotional growth, as well as literacy development and critical thinking. The Gill ES principal mentioned a farm-to-table project
in collaboration with a local farm and a local restaurant, and that volunteers from the elite private school Northfield Mount Hermon were volunteering in Spanish and art lessons at the school. The principal of Hillcrest ES talked about their therapeutic classroom, and reading interventions. The Sheffield principal and assistant principal discussed use of logical consequences to manage student behavior, and mentioned an after-school running program for girls that focused on building self-confidence and self-esteem, and said they were considering adding a parallel boys program in the future. The superintendent promoted adult learning by presenting a packet of detailed information about “affective learning” to the school committee in December that covered SEL, multicultural education, citizenship education, and social justice education.

The superintendent reported in April that they had been invited by the state DESE to host in a “turnaround site visit” at Sheffield ES conducted by an evaluation team, and they decided to engage. This team visited classes, interviewed staff members, and reviewed files, then submitted a report with feedback at a later date. The district also engaged in a scheduled DESE Coordinated Program Review (CPR) focused on special education, civil rights, and English learner education. This process is required of all public schools in the state, and was not a choice.

Regarding future teaching and learning plans, the superintendent foreshadowed preliminary plans to provide secondary teachers time, resources, and training over the summer to “begin to revise our grades 6-12 curricula with an eye towards infusing more local and Native American history, as well as curricula that will teach multicultural, social justice, and active citizenship concepts and habits of mind.” The secondary principal proposed revisions to the high school program of studies for 2017-18, which were approved by school committee vote. These changes included slight adjustments to foundational
courses, plus new electives in Social Justice and Conflict Resolution, Embodied Leadership, Independent Studio [Art] Internship, and Maker Space I/II. In addition, she outlined curriculum revision plans to “intentionally promote a view of native history as an essential component of American history.” These were directly related to the high school mascot issue, as well as broader strategic plan initiatives.

Political Actions

GMRSD leaders engaged in political action related to state funding for public education. In October, the school committee voted to adopt a resolution claiming they were opposed to a state ballot question that sought to increase the number of charter schools allowed in the state that was sponsored by the Massachusetts Teachers Association (the primary teachers union). They also voted to support resolutions sponsored by the Massachusetts Association of School committees (MASC) in support of increasing the state foundation budget for public schools, enacting a “millionaire’s tax” to fund this, limiting charter school impacts on traditional public schools, and prioritizing student SEL.

The superintendent reported on his involvement with a group called the Massachusetts Rural Schools Coalition, which was led by the superintendent of a nearby school district. This group sought to inform state legislators about problems affecting rural schools in the state that were related to declining student enrollment, rising costs, and level state aid. In November, the school committee voted to adopt two resolutions sponsored by this group that sought increased state resources for rural schools, and support to address these issues. The literature shows that some traditional public school districts respond to competition through political action (Hess, Maranto, & Milliman, 2001b; Holley, Egalite, & Lueken, 2013), and this occurred in the GMRSD by voting for these resolutions.
While not a GMRSD organizational decision, supporters of the Indians mascot decided to engage in political action when they were denied access to the mascot decision (i.e., the school committee alone would ultimately decide). They arranged to have a non-binding question on the Montague town ballot for the May election in order to send a strong message to the school committee about the will of the town. I include this political action within the decision-making system, as it was intended to directly affect the school committee’s behavior.

**Administration and Operations**

Administrators engaged in codifying and revising existing policies and procedures. In preparation for the Coordinated Program Review (CPR), they created a special education manual to codify and organize existing policies and procedures. They revised the student activities manual of policies and procedures based on an audit that they had commissioned earlier per recommendation of the district accountants. They also changed the procedures for scholarship awards based on a mistake that occurred in 2016.

The district was already engaged in a capital improvement project to replace windows on the Sheffield ES building. Maintenance projects included landscaping and athletics field maintenance, cosmetic painting improvements to the secondary school, and general maintenance to floors, electrical systems, and the like. Grants allowed the food services coordinator to purchase a steam oven, restaurant-grade mixers for breakfast smoothies, and additional food for students. The district offered free summer meals in 2016 that had been funded through grants. Hillcrest ES participated in a subsidized fruit and vegetables program in order to offer these free to students at snack time. The director of business and operations arranged to share special education transportation costs with
neighboring Greenfield Public Schools, and streamlined bus routes to cut down on general student transportation costs.

The school committee voted to approve a capital improvements plan for 2017-18 that included replacing the roof, upgrading the electrical system, and epoxying the kitchen floor at Gill ES, replacing the water heaters at Hillcrest ES and Sheffield ES, and upgrading the electrical system at Hillcrest ES. They voted to approve submitting a statement of interest to the MA School Building Authority for funding on the Gill ES roof project, and to bring plans for the Hillcrest ES stage renovation and to replace rotting pillars at Sheffield ES to the town of Montague for a vote at town meeting. The director of information and technology presented her decisions about technology priorities that included upgrading technology infrastructure, and replacing some teacher and student laptops to make progress on the goal to provide all middle school students with a Chromebook by 2018-19 in order to be comparable to other schools in the area. Making a decision based on what other successful schools appear to be doing is potentially evidence of mimetic pressure in the field (DiMaggio & Powell, 1983).

**Communications**

One of the superintendent’s professional goals was to build community engagement. He published regularly on the district website and Facebook page, and aired biweekly radio spots on the local station. Content included district-level information, and community resources such as a daily menu of free summer meals, an announcement of the hiring of the Sheffield principal in July, the superintendent’s welcome letter in August in which he introduced his priorities for the year (depth over breadth in the curriculum, higher order thinking, hands-on learning, authentic performance tasks, and less focus on standardized testing). He invited feedback on curriculum maps linked on the district’s website, and said
that they would be continuing to focus on quality relationships between and among students, school staff members, and parents, as well as multicultural and diversity awareness.

To promote community engagement and transparency, he consistently posted information about the mascot review including the draft process that the school committee was considering, and public forum and inquiry event dates, formats, and reminders. Other Facebook posts throughout the year included: weather-related changes to the school schedule, a letter of district support for immigrant families, congratulations to the boys and girls basketball teams for making the semi-finals, encouragement to see the middle/high school musical, a thank you to the town of Montague for approving a capital improvement project, a note from the fifth grade teacher at Gill ES saying his class would be mentioned on the local television weather report, an announcement about a mistaken fire alarm at Sheffield ES, and a thank you from the Friends of Hillcrest for donations to their food drive.

The superintendent recorded fourteen radio spots over the course of the year. In September, he highlighted technology by referencing the district’s purchase of 150 new Chromebooks, and setting up individual Google accounts for each student. He listed summer work including: professional development on leadership and multicultural/diversity education, the free summer meals program, and sprucing up school facilities. He added that they were going to be focusing on writing across the curriculum throughout the school year. In October, he discussed a new peer mentoring program in the middle school. In November, he highlighted a farm-to-table project at Gill ES in collaboration with a local farm and a local restaurant. In December, he talked about a district fundraiser for childhood cancer support organized by an assistant principal. He promoted academic, arts, and athletics programs at GFMS for those who would soon be making school choice decisions, discussed GFMS participation in a statewide community service program managed by the Governor’s
office, the TFHS advisory program and use of restorative practices. He promoted the MS/HS musical, and a second grade philosophy unit at Sheffield ES.

**Procedural Votes/Routine Decisions**

The school committee voted to approve minutes from each prior meeting before they became part of the public record, and there were rarely any edits. They voted to approved their election warrant and ballot, and then engaged in restructuring after the election in May by voting on appointed positions (e.g., chair, vice chair, representative assignments, contract negotiating committees, etc.). At various points during the year, they appointed members to serve on subcommittees and as representatives to town committees and outside groups when there were vacancies.

The school committee is required to periodically review and update its own policies. In late November, they created a policy subcommittee that presented recommendations in February. Most of these changes were to drop redundant policies covered elsewhere, or did not otherwise represent a noticeable change, and they were approved by unanimous vote. The school committee voted to approve the annual report. They responded to an Open Meeting Law violation claim, and voted that they had not violated the law after listening to the case. Based on a state law that requires traditional public school districts to approve private schools that are located within their boundaries, the school committee approved the Four Winds School in Gill.

**Decision Overview**

The decisions outlined above, aside from those related to the Indians mascot debate, are typical of traditional public school districts in Massachusetts. Most of them were made

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5 It is unlikely that any school committee in Massachusetts would vote not to approve a private school that is located in their geographic boundaries, especially under the broad and subjective criteria set by the state, unless for political reasons.
through flight or oversight processes that did not involve much, if any, discussion or deliberation among school committee members. School committee members trust the administrative team’s judgment, and rely on their expertise in order to understand what they are voting on when it is required. Or they align decisions with state and local regulations and policies without having much of a choice at all. This section was organized by decision topic.

The next section outlines several major issues, trends, or dilemmas that functioned as elements in the GMRSD system.

2016-17 GMRSD System Elements

System elements are the major issues, trends, and dilemmas that attract attention and generate activity. Most the elements present in the 2016-17 GMRSD system had been there prior to the start of the year. An overarching one was an evolving sense that the district was responsible to support an increasingly diverse set of students and families. Others included perennial problems such as unstable finances, lackluster and ineffective academic programs, disruptive student behavior, poor school reputations, and patterns of family flight. Consideration of the appropriateness of the high school’s Indians mascot was a previously disregarded issue that garnered significant attention in the system during the 2016-17 school year. Despite all of the other concerns and responsibilities, this issue activated an inordinate amount of stakeholder interest and involvement, and became the dominant system element.

While I describe these elements as separate entities, they have overlapping and mutually intensifying aspects to them. For example, the district’s unstable financial situation was perceived as an ongoing problem by organizational leaders and other stakeholders alike. One reason for the resource issue was the high percentage of families that chose other school options, which reduced state per-pupil funding. On surveys, many of these families claimed they left because they were dissatisfied with the district’s academic programs, or
frustrated by disruptive student behavior. This systemic relationship between finances and student/parent satisfaction makes it difficult to analyze any of these issues in isolation, hence the systemic approach. I describe the elements of the GMRSD system in detail in this section, and provide historical context throughout.

**The Indians Mascot**

The most pervasive and resource-intensive issue in the GMRSD system during the 2016-17 school year was a community-wide discussion about the TFHS “Indians” mascot. It is represented in the school colors of royal blue and white by a stylized image of a man’s profile wearing a full feathered headdress typical of Indigenous tribes in the Plains region of the United States. The origin story of the Indians mascot is rooted in Turners Falls’ bloody history during the Colonial Era. Competing perspectives on the meaning of the mascot name and symbol were expressed by two primary participant groups that I describe in detail below.

**History and significance of the mascot.** In 1676, a militia led by English colonist Captain William Turner attacked an Indigenous fishing camp known as Peskeompscut that was on the banks of what is now called Barton Cove in the calm water just above the falls on the Gill side of the Connecticut River. They killed hundreds of unarmed women, children, and elders, and were killed themselves when the men returned with others from neighboring camps and led a counterattack. This battle was key in the larger King Philip’s War. According to local history, descendants of English soldiers who participated in the battle were entitled to the land based on the laws at the time, and they settled in what is now Gill and Montague. The village of Turners Falls, and the falls themselves, are named after Captain Turner, and the Indians mascot is purportedly intended to honor those who died. The logo is often accompanied by the tagline “Dignity - Strength - Honor - Pride.”
There is a mutually-reinforcing relationship between the Indians mascot and a longstanding positive association with school athletics in the GMRS. The high school softball team is legendary in the area, and won the state championship for the ninth time in 2017. These girls are looked up to as athletes, and are afforded the admiration that is traditionally bestowed upon male athletes in dominant sports. Football games draw huge crowds, and the team won the western MA division in 2016. Even in losing years, there is a strong tradition of parents and extended family members attending games, even after their children graduate. The secondary principal told me that it was often difficult to get a parking spot during a big game, and that she made a concerted effort to attend a lot of student games and meets because it was such an important aspect of the traditional school culture. She told me that girls were very empowered at the school, and that boys and girls athletics were equally supported by the many fans in the community (interview, December 2016). As a resident of a neighboring town since 2004, my personal impression has always been that TFHS is known for their athletics program, and they are consistently referred to in local media as the “Indians.”

Simultaneously, there are longstanding objections about the history of European violence and oppression of Indigenous communities in the area. The problematic nature of the Indians mascot had been raised publicly for years. In 2004, the Montague town administrator at the time reached out to local Indigenous groups because he and other members of the selectboard believed the town was under a curse due to the events in 1676. They conducted a reconciliation ceremony at the site of the battle on the 328th anniversary that included town and Indigenous representatives organized through a local organization called the Nolumbeka Project, whose mission is “To promote a deeper, broader and more accurate depiction of the history of the Native Americans/American Indians of New
England before and during European contact and colonization; to protect and preserve sites sacred to, and of historic value to, the Native Americans/American Indians of New England; to create and promote related educational opportunities, preservation projects and cultural events; and to work in partnership, as much as possible, with the tribes” (http://nolumbekaproject.blogspot.com/p/our-mission-to-promote-deeper-broader.html).

Ceremony participants signed a reconciliation agreement that states, “In the Spirit of peace, healing and understanding we come together on this date on May 19, 2004, to acknowledge the tragic events that took place on the shores of this river on May 19, 1676 and thereby begin to put the tragic echoes of the past to rest” (http://nolumbekaproject.blogspot.com/p/reconciliation-ceremony-2004.html).

**A request to change the mascot.** In May 2016, a group of Montague residents approached the superintendent and school committee to ask them to consider the appropriateness of the Indians mascot, claiming it was a racist stereotype, and inappropriate considering its purported origins. This issue had been raised in the past. One member of this group said that he had written about this in a local paper 15 years prior. During one of my meetings with the secondary principal, I noticed some charts on her office wall with what appeared to be brainstorming notes written by multiple participants in many colors and handwriting styles. Someone had written a comment that said, “Can we re-examine changing the mascot please?” and someone else had written “THIS” with an arrow pointing to it. She told me that they were from a faculty meeting in June 2015.

When the school committee decided to consider the Indians mascot, this prompted intense stakeholder involvement that consumed most of the organization’s attention during the 2016-17 school year. There were two basic, competing perspectives that I term “localist” and “regionalist.” Localists were in favor of keeping the Indians mascot, and regionalists
wanted a change. Each side submitted a petition to the GMRSD school committee in September 2016 that explained their point of view on the topic, and petition comments provide additional detail on their perspectives. I describe these two perspectives next.

**Localist perspective.** Many “localist” stakeholders personally identified with the Indians mascot, and viewed it as a symbol of respect, claiming it honored those who died in the battle at Turners Falls. Individuals in this group have a deep relationship to the towns of Gill, Montague, and Erving, and are associated with the GMRSD as alumni, parents, and active community members. They tend to be white and working-class, and have deep roots in the community, some that go back generations. During the case study year, localists represented the most prominent GMRSD stakeholder voice, and it was difficult to tell if this group was actually the numerical majority, or they were simply loud and engaged. Most of my interview participants believed that this group comprised the majority of stakeholders. This perspective, combined with demographic trends in the towns and schools over the past several decades, lead me to conclude that this group was, in fact, the majority.

The Indians mascot/logo is more than a symbol to localists; it is part of them. A high school teacher said to me, “They bleed blue here. I don’t know if you’ve heard that expression” (interview, October 2016). Comments from a “Save Our Logo TFHS” petition that was presented to the school committee included, “Proud to be a Turners Falls High School Indian,” “Deep down I always was and always will be an INDIAN!,” and “I’ve always had extreme love and pride for our Turners Falls Indians!! My blood bleeds blue!!” One signatory clarified that the symbol represented identifying with ideas and not a race: “I am not in favor of offending anyone but I just see it as one of these things that has always been that way, it is how we see ourselves. Not of course as native americans but as Turners Falls Indians.” A person who did not attend TFHS could take on this identity by embracing
the Indians ideology. For example, one signatory explained her situation: “My husbands extended family, our 3 children all Turners Falls Indians. I as an ‘outsider’ we devoted many years coaching and watching our kids play for the Turners Falls Indians. We encouraged our fans and cheerleaders to show Indian Pride.” The Indians mascot is part of localists’ personal identity.

This identity is built up over time through participation in school athletics events and school pride celebrations. A 1994 graduate and parent of a senior in 2016-17 said that when she was in high school, attending games “was huge. Like all the parents...and it’s a small town, so like everybody’s parents were there screaming their heads off” (interview, April 2018). She described how there used to be a successful marching band and drum corps that performed at all of the football games along with cheerleaders and a color guard (i.e., choreographed routines with flags), and that these groups won competitions. There is a large trophy case in the high school building with many of these awards in it (observation, October 2016). This shows that athletics conceptually included performers as well in people’s minds.

I asked this interview participant to describe her personal connection to the Indians mascot, and she said immediately, “We were really proud. We were proud Indians.” She then talked about the TFHS football and softball teams, and how good they were. I followed up by asking what else the school was proud of. She paused for a long time before saying,

I think it used to be...they’ve dropped so many things, but it used to be that the classes would do so many more things together, like float making. They don’t do that anymore. They used to do more spirit week kinda stuff, like decorating the hallways, and Indians stuff everywhere, and parades in town. (interview, April 2018)

These traditions had dropped off somewhat in her daughter’s generation, but athletics and school spirit events remained a central focus of community attention. This illustrates the extent to which the Indians mascot identity extends beyond athletics alone, and includes
student musicians and performers who participate in the culture surrounding the athletics program, as well as general school spirit activities.

The idea that being an Indian was something to be proud of was expressed by people of all ages in my data. For example, in September 2016, the Greenfield Recorder (the primary local news media publisher) quoted TFHS students about why they were fighting to keep their mascot. Sections of the article state:

“I think people think that we’re dishonoring the Indians, but we’re really representing them in the most honorable way that we can,” said 18-year-old senior Michael Babcock, a member of the football team. “We’re proud to be the ‘Indians.’

Jack Darling, an 18-year-old senior also on the football team, argued that school alumni have amicable relations with the local Native American tribes, who he claimed haven’t expressed concern with the mascot. “They’ve said they see no problem with it and neither do I,” Darling said. For Darling, being a Turners Falls “Indian” is a point of great pride. He has a Native American skull with a headdress tattooed in black ink on his chest.

Sisson agreed with Darling, saying that having the school’s mascot be the “Indians” is not meant as a sign of disrespect toward Native Americans. “All we have is respect, pride and honor for the school and our sports,” she said.

On the other end of the age spectrum, a signatory to the “Save” petition wrote,

As a class of ’67 Alum, I was and am still a proud graduate of TFHS, and this emblematic display of nobility and honor. Let’s not assume the worst when looking at this Mascot, but know that to have your tribe, your culture, your history held in such regard by so many is an honor of the greatest magnitude. (September 2016)

In the middle of the age range, another “Save” petition comment said, “TFHS Alumni class of 2001! I believe that we use the indian as a mascot not to demean native Americans but because they, as a people, represented pride, honor and strength!” The words “dignity, strength, honor, and pride” were ubiquitous among Indians supporters in my data sources, which reflects the common tagline that accompanies the logo.
The GMRSD school committee banning the Tomahawk Chop and war chant in 2009, and then reinforcing this ban in 2017, was seen by locals as evidence of political correctness run amok. A TFHS alumnus said to me,

I don’t know how I feel about that whole part of it, because that’s just what we did in school. Like I guess it’s...not PC, you know? I don’t know, it’s like sometimes the actions behind things and the feeling behind things are not what...people...I don’t know, think they are, or think they should be...like when they’re doing the Tomahawk Chop they’re not thinking about what it actually is, or what it means, or...it’s just to a song at a football game. (interview, April 2018)

In 2009 when the “chop and chant” were first discussed, there had been another school committee vote on a motion that stated that “we do not support the use of any symbolism; physical, musical, verbal or graphic that may be construed as a caricature of a culture, race, or ethnicity.” This motion had failed five to four. This vote likely indicates that some school committee members were worried that such a vote would open the door to removing the Indians mascot, since the issue had been raised before. The school committee’s decision in 2016 to take on this issue confirmed these fears for locals.

Key localist participants. The localist group was comprised of individuals whose attention and point of view were focused at the town level, and whose primary purpose in the GMRSD system during 2016-17 was to advocate for keeping the Indians mascot. For them, the Indians mascot is a symbol of pride, and the suggestion to rid the district of this symbol constituted a personal threat. One interview participant said,

A lot of the people who are really strongly wanting not to change the mascot, are graduates of the school. Their connection is not to what is going on academically, their connection is to sports. So they maintain a really deep connection, but not to anything directly to do with the classroom. (interview, April 2018)

While there were many individuals in this group who participated in system activity in 2016-17 through social media, local news media, and school committee events, I highlight here a selected set who exerted significant influence by also participating in person at school
committee meetings, and who engaged in active communication with GMRSD leaders. I was not able to interview any of these individuals, but their perspectives and interrelationships were documented clearly and abundantly in school committee meeting minutes and videos, mascot forum and inquiry event videos, local media, and Facebook.

Jeremy. Jeremy first appeared in the GMRSD 2016-17 system in September 2016 when he started a petition on change.org to keep the Indians mascot/logo titled “Save Our Logo TFHS” that attracted 1,236 supporters. The Greenfield Recorder ran two articles around that time announcing the petition, and describing him as the parent of a current GMRSD student, as well as a 1992 graduate of TFHS. One article quoted him as saying that “he welcomes a discussion about the issue and hopes that the committee will hear both sides” (Greenfield Recorder, September 2016). In the petition, and in his statements to the school committee when he presented it to them later that month, he emphasized the Indians mascot’s connection to the local history of King Philip’s War, and requested they table the discussion in favor of a town-wide vote. Jeremy was quoted in an article as saying, “I don’t think it belongs with the School Committee, it belongs to the townspeople and those in the district” (Greenfield Recorder, October 2016). He did not contribute much to social media.

Chris. Perhaps the most politically engaged of all the localists was Chris, who described himself as “President, TFHS Class of 1985” in an opinion piece he wrote in support of keeping the Indians mascot that was published in the Greenfield Recorder (November 2016). He was a parent of a current TFHS student at the time, and had lived in Montague his whole life. In this opinion piece, he outlined his core beliefs about the Indians mascot when he wrote,

The name and logo are part of the history of this town and its school teams, and we identify with them. Our connection to them can be seen in our yearbooks, where the
name Peske-Tuk is proudly displayed, and as with the class of 1957, which so beautifully wrote a dedication to those same people. Our connection and respect is undeniable. (Greenfield Recorder, November 2016)

Chris started and managed a Facebook page called “Save the TF Indians Logo” with Marisa (described next). This was the primary social media forum for localist participants aside from the GMRSD Facebook page (managed by the superintendent), to which they also contributed extensively. Chris was a staunch supporter of the idea that a majority vote of community members was the most appropriate way to decide about the mascot. He was instrumental in an effort to get a question about local support of the Indians mascot on the Montague town ballot. He worked tirelessly to organize the localist side, primarily through the “Save” Facebook page, and actively contributed at school committee meetings, and at public forums.

**Marisa.** Marisa was the Erving representative to the GMRSD school committee during the 2016-17 school year, but she was rarely in attendance at meetings. She was a parent of a current GMRSD student during 2016-17, as well as graduates. She helped Chris to manage the “Save” Facebook page, on which she posted a written statement where she identified herself as having Native American ancestry. She explained her perspective on the Indians mascot issue in a Facebook post on the “Save” page:

What many people do not, CANNOT, understand is that [Indians supporters] are coming from a place of love and honor in their hearts and souls. But they have been made to feel dirty and “foolish” for these things by the SC, visitors to our meetings who berate them and verbally attack them on their school grounds in the parking lot after meetings and by anti-logo supporters who have sullied their names on social media. (Facebook, January 2017)

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6 “Peske-Tuk” is an Indigenous phrase loosely translated as “divided river,” which is used as the title of the TFHS yearbook.
When Marisa did appear at school committee meetings, it was to criticize them for their handling of the mascot consideration process, and she repeatedly accused them of being unethical.

She spoke at a school committee public forum on the topic in November. In her statement, she quoted extensively from school committee meeting notes, and questioned why and when the school committee had decided to take on the decision themselves when the people who had originally brought this forward suggested finding out the “will of the people” (quoting the Montague Reporter, May 2016). She wondered aloud who had drafted the process, and why it automatically included mascot selection as one of the steps. She read from a community member’s letter to the school committee that cited the draft process on the night it was first presented, and wondered how she even knew a process was in the works. She ended her public statement with a final question, “When did we lose our voice and representation for what goes on in this community?” (forum, November 2016). She was also a strong supporter of the Montague town referendum.

**Tammy.** At one of the school committee’s public forums, Tammy described herself as a 1983 graduate of TFHS, and a “taxpayer.” Her daughter was a seventh grader at GFMS in 2016-17, and regularly engaged in political action regarding the mascot issue with her mother. Tammy’s perspective on the mascot was that there was no possible way for any reasonable person to have a problem with something that represented dignity, strength, honor, and pride. Bullying was a prominent issue for Tammy, and she regularly referred to people as bullies. She claimed that her daughter had been bullied by an adult for wearing

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7 Tammy’s daughter was a consistent contributor with a localist perspective on the GMRSD Facebook page, and frequently appeared at school committee meetings and at the November forum with her mother. She was pictured in the Greenfield Recorder gathering signatures to get the mascot vote on the Montague town referendum. I do not discuss her participation further due to her status as a minor.
sweatpants with the Indians name and logo, and that anyone could look this up because it had been reported on in the Greenfield Recorder. Costs associated with changing the mascot were a common refrain among localists, and a focus issue for Tammy. In her forum statement, she asked, “If this goes through, who’s paying for it?” (forum, November 2016). Tammy was active in the effort to gather signatures to put the mascot question on the Montague town ballot.

**Jeff.** A parent of a former TFHS student, Jeff is an interesting character on the localist side due to his shifting perspective. At the school committee’s first forum in October, he spoke fondly about the days of watching his son play football for TFHS. He said that he continued to be an active fan at TFHS sports events, and specifically mentioned the football and softball teams. He described himself as a former professor of U.S. history at Boston College. He stated that he was neutral on the Indians mascot because, although he did not perceive it to be a basis for racist thinking, he also did not perceive it to be that important to players or fans. He suggested that a way to honor local Native Americans would be to teach their history in the schools as “more part of the curriculum, and not just come up when people attack the Tomahawk Chop, and stuff like that.” He hoped that everyone in the community could “agree to disagree.” Soon after this event, and in apparent contradiction to these statements, he spearheaded the effort to create a non-binding referendum on the Indians mascot on the Montague town ballot in May 2017, and appeared at an early November school committee meetings to tell them this.

Jeff’s contributions to a wide range of political debates in town were apparently commonly known. He had been a GMRSD school committee member in the past, as well as a Montague finance committee member, and remained active in local politics. In April 2016, he published an article in the Greenfield Recorder outlining his assessment of the problems
with the state’s funding formula for public education, and criticized the head of the Mohawk Regional School District claiming that his advocacy group, the Rural Schools Coalition (of which the GMRSD superintendent was a member) was politically divisive and potentially contributing to losing allies in larger districts in the eastern part of the state (Greenfield Recorder, April 2016). He was described by the president of the GMRSD teachers union as a “polarizing figure” who had failed to be re-elected to the school committee (Greenfield Recorder, March 2016). In response to a claim in the Montague Reporter that Jeff had been responsible for one of the school committee members losing her seat in the May 2017 election, Chris claimed of Jeff on the “Save” Facebook page, “We can tell you that Jeff Singleton has no favorites; he is a true political junkie. It is, was, and always will be about process, process, process with Jeff” (Facebook, May 2017).

*Student representative.* The student representative to the school committee was a relevant localist figure in that when he did express ideas about topics other than student activities, fundraisers, and school spirit events—which was rare—he presented ideas that were perceived to be the dominant student perspective according to the secondary principal and other secondary school employees. In January, the school committee meeting minutes state that he “asked the committee on behalf of his peers if the School Committee had already made a decision regarding the mascot/logo issue” (SC minutes, January 2017). This represents the idea that the secondary principal often heard expressed by students that the process was designed to validate a decision that had already been made (interview, April 2018). Many localists believed the same.

The student representative was quoted in a local news article as saying, “We are the athletes and the musicians that have the Indians name. For all these people to tell us that we have to change it without asking our input, it’s not cool” (WWLP, February 2017). He asked
how fiscally responsible it was to have to replace items associated with the logo change instead of supporting things like student computer upgrades. Fiscal responsibility was an argument that many mascot supporters made to criticize the process as a waste of resources (see Tammy above). The secondary principal said that her perception was that the student body was fairly unified around the idea of keeping the Indians mascot throughout the 2016-17 school year, but that there were some students who were for a change who did not speak out publicly.

**Regionalist perspective.** Compared to the localists’ narrow focus, individuals in the “regionalist” group had a more expansive point of view that included regional and national perspectives. Their arguments against the mascot ranged from an assertion that it was a racist stereotype and a civil rights violation, to claims that it was harmful to Indigenous youth, to concerns about how such a symbol affected the district’s reputation. They tended to be ideologically liberal and politically progressive, favoring social reforms that align with developing societal understandings of social justice. For them, the Indians mascot was a racist, disrespectful symbol that was—however unintentionally—connected to the schools, and it needed to go. For example, comments from the “Change the Turners Falls Mascot/Logo” petition that was submitted to the school committee included, “We deserve better than outdated stereotypes and racist mascots,” “I think it's a matter of common sense and decency to ditch the ‘tradition’ of racist stereotypes and diminutive isation [sic] of ethnic groups for sporting mascots,” and “We must acknowledge the racist inherent in this school's mascot and remember that public schools are intended to serve all of our children” (petition, September 2016).

Many regionalists compared the “Turners Falls Indians” to similar constructions that would be seen as inappropriate by most people. For example, a man who identified himself
as the grandfather of future GMRSD students (I assumed this meant that they were infants or toddlers) said at a school committee meeting:

The arguments that favor keeping the “Indian” mascot are socially insensitive, morally mistaken and above all, for an educational institution, intellectually inconsistent. If we would never even think of using “Blacks”, “Negroes”, “Orientals”, or “Indians” (as in Hindus or Muslims from the Sub-Continent. Complete with charmed snakes and turbans) as nicknames and symbols for our sports teams; what flawed thinking process would tolerate the appropriation of the name of any human group for use as a mascot? (SC minutes, May 2017)

David, a prominent regionalist whom I describe in greater detail below, was quoted in the Greenfield Recorder as saying:

When you think about [Captain Turner’s attack on the fishing camp], it’s sort of like, what would you name a sports team in the town of Auschwitz? Would you name it the Hitler Jews? It’s a very similar situation” (September 2016).

In the same article, David made a similar comparison when he said, “We try to say, ‘we’re honoring them, we’re honoring them.’ But would we name a swim team ‘The Turners Falls Hispanics?’” This theme was echoed by other regionalists. For example, a “Change” petition comment said, “Would you consider the ‘Andrew Jackson High School Cherokees’ a form of honoring the dead?” At one of the school committee’s public forums, a man suggested that calling a team in Mississippi the “George Wallace High School Blacks” would be perceived as ridiculous (November 2016).

One explanation on the regionalist side of the localists’ acceptance of the Indians mascot was that the community was blind to some aspect of the logo that did not allow them to see discrimination that would have been easily detected in other cases. “Change” petition comments said, “Certainly, if it were a stereotypical Black person, a Jewish person or any other ethnic group, this wouldn’t even be a conversation,” “If it were any other racial or cultural group this would not be an argument it would already be a done deal,” and “Indian
mascots in American sports culture are one of the last vestiges of overt racism that is considered normal” (September 2016).

Regionalists looked critically at the Indians mascot in the context of a school’s primary identity marker while also recognizing that it held a significant place in the district’s culture. At a September school committee meeting, one community member said of the process to consider it,

I think you’re going to hear a lot about “tradition” and from people who associate values such as loyalty, honor, and respect with being “Indians.” While tradition is important and those are laudable values, they are not what the wider world thinks of these days when they see a school or a sports team that still has an “Indian” for a mascot (SC minutes, September 2016).

The “wider world” was a reference to social norms regarding racial stereotypes, and an evolving recognition that Native American-themed mascots, names, and logos—especially when adopted by primarily white organizations and their audiences—are no longer socially acceptable.

**Key regionalist participants.** The regionalist group was comprised of individuals whose attention and point of view were focused at the regional level (i.e., minimally the school marketplace, but also at the state level and beyond), and whose primary purpose in the GMRSD system during 2016-17 was to advocate for changing the Indians mascot. There were many individuals in this group who participated in system activity in 2016-17 through social media, local news media, mascot forums, and mascot inquiry events. I highlight here three who exerted significant influence by also participating in person at school committee meetings, and engaged in active communication with GMRSD and town leaders.

**David.** A lead member of the group that brought the Indians mascot issue to the school committee was David. He was a longtime resident of the town, and had adult children who had attended GMRSD schools. He was a former editor of the Montague
Reporter (a hyper-local news media publisher), and current board member of the Nolumbeka Project. He was active in local politics, and had brought up the mascot issue in prior years.

David strongly believed that the Indians mascot was racist and harmful, as well as inappropriate due to its purported origins in the 1676 massacre. In his original presentation to the school committee, he cited a resolution from the American Psychological Association (APA) about ridding schools of Native American mascots and logos due to their harmful effects. According to the school committee meeting minutes, the group “suggested that a year of outreach and education on the subject within the community be taken and bring forth to the annual town meeting for an advisory opinion and then come back to school committee with what the will of the town is” (May 2016). (This is the quote Marisa used to challenge the school committee’s seeming disregard for the localist perspective.) However, David and others in this group claimed later in the process that the Indians mascot was a civil rights violation, thus not up for debate or vote.

David presented the petition “Change the Turners Falls Mascot/Logo” that gathered 923 supporters at the September 2016 school committee meeting on behalf of a TFHS student who had started it (one of the few black students in the school). The introduction to this petition recognized that the intention of the Indians mascot was to honor Indigenous tribes who were massacred, and went on to state that The U.S. Commission on Civil Rights “believes that the use of Native American images and nicknames in school is insensitive and should be avoided.” David spoke at the school committee’s November forum, reiterating these types of statements, and made it clear that the people who had brought the issue to the school committee were local residents. He actively opposed the effort to put a question on
the Indians mascot on the Montague town ballot, and spoke against it at the town
selectboard meeting immediately before it was approved.

Jen. Another member of the group that brought the Indians mascot issue to the
school committee was Jen, a resident of Montague, a Town Meeting member, and one of the
two employees at The Partnership. For nine years prior to joining The Partnership, she had
worked in a variety of roles at the Center for Responsive Schools (formerly the Northeast
Foundation for Children), which is a nationally-known educational organization located in
Turners Falls that developed the “Responsive Classroom” SEL program used in all of the
GMRSD elementary schools. Jen consistently advocated for opportunities for community
dialogue around the mascot issue, and offered space and facilitation through The Partnership
for this purpose, but no one took her up on this offer.

Jen spoke at a few school committee meetings to advocate for dialogue, and to
remind people about how much this decision would affect the schools’ and towns’
reputations in the wider community. She commented on the “Change” petition:

I am concerned about the negative perception people have of our community and its
schools. In the past year I’ve had the opportunity to work closely with
administrators, teachers, staff, and students in all the GMRSD schools, and I’ve seen
firsthand that they have a lot to be proud of—and also that the schools’ “image
problem” holds them back. The mascot contributes to the problem. At this point in
time, regardless of what the mascot means to people locally, times have changed. A
mascot needs to be a symbol with a meaning that can be understood at a glance.
While people in the know may see it as a symbol of pride, the message having teams
called “Indians” conveys to the world is that we are behind the times, ignorant, and
resistant to change. (September 2016)

This indicates that Jen was deeply aware of the power a symbol can wield in terms of
conveying “at a glance” an organization’s values. She saw the Indians as representing the
district as being out of alignment with current social values, and recognized that the schools
had an “image problem.”
From Jen’s perspective, the underlying problem of having a mascot that is perceived as racist is that the district’s brand develops a poor reputation among potential stakeholders who could bring resources into the system. She said to the school committee, “I think a lot about how funders, prospective employees, and potential school choice families see us, and I look forward to the day when the vision you’ve laid out doesn’t seem at odds with the fact that our high school sports teams are still called ‘Indians’” (SC minutes, September 2016).

Part of this reputational problem, from her perspective, was that a highly publicized hostile and divisive process would reflect poorly on the district, and serve as evidence to those who did not have direct experience that the towns were full of people who were supportive of a racist symbol. She was calling attention to the fact that stakeholders outside of the group of direct organizational participants of students, parents, and alumni were paying attention to the school’s identity as represented by the Indians mascot/logo.

**Rhonda.** When Rhonda first addressed the school committee in September 2016 (which I attended), she started speaking in a language that I assumed was Indigenous, then translated into English to say that she had attended TFHS for one year as a teen, and now lived in a nearby hilltown to the west. In her comment on the “Change” petition, she wrote, “I am Inupiaq/Athabaskan, an enrolled member of my tribe and federally recognized and enrolled as well.” At this meeting, she said that “the real issue that’s been ignored, or even silenced, is that there’s been no consultation with the direct linear descendants of those killed in the massacre” (September 2016).

Her identity as a local resident, a former TFHS student, member of an Indigenous group, and active in the Indigenous rights movement gave her a unique perspective and position of authority within the Indians mascot debate. At the September meeting, she wore a T-shirt with the slogan “Not Your Mascot,” and some on the localist side often used this
as a label for the regionalist perspective (i.e., “the not-your-mascot people”). She spoke at the school committee’s October forum, and ensured the audience that she was not a paid protester, as had been repeatedly suggested on the “Save” Facebook page, and presumably in conversational circles within the localist group. She said, “I am an activist because I was born Native American.” At the forum, she said that the school was sited on “colonized Nipmuc land” and that white people erased whole peoples and cultures when they came here. She also reiterated many of her points about the harm in race-based stereotyping. When her statement went over the allotted three minutes, localists in the audience began clapping loudly over her until she stopped talking and resumed her seat in the audience.

Echoes of a prior contentious school consolidation process. The debate over the Indians mascot divided the GMRSD community during the 2016-17 school year and beyond, and consumed an inordinate amount of stakeholder attention. This contentious process seemed to mirror a prior issue that had similarly divided the community—a debate over closing one of the GMRSD elementary schools in 2007. Almost all of my interview participants referred to this issue unprompted in our conversations. They used it as an example of how the community contained factions with completely different needs and interests, and how these factions used political strategies to get what they wanted. This incident had occurred ten years prior to my data collection, yet the stories were emotionally charged as if they had occurred yesterday. The eventual decision to close the Montague Center School caused lingering resentments, and resulted in segments of the community actively disengaging by enrolling their children in schools outside the district. I describe this incident below in detail due to its relevance for stakeholders in the GMRSD community during 2016-17.
Part of the thinking behind education reform efforts that increase competition among schools is that school districts will be forced to increase efficiency in order to improve and compete (e.g., Chubb & Moe, 1990). In rural areas, consolidation is often proposed as a solution, and the state has provided financial incentives for towns to regionalize their public schools over several decades. Gill and Montague had already entered into a regionalization agreement in order to create economies of scale. In 2007, the GMRSD had been labeled “underperforming” by the state, and was on a mandated Turnaround Plan. Town officials in Gill were increasingly unsatisfied about their relationship with the GMRSD, which was typified by steeply rising costs and falling performance metrics, and formed a Commission on Education (CoE) to investigate options for pulling out of the regionalization agreement (Gill CoE report, 2009).

The Turnaround Plan warranted spending additional resources, and the towns were yet again being asked to increase their local assessment to fund schools that were not meeting expectations. Some Montague residents were as dissatisfied at those in Gill. A group of community residents collected signatures to get a question on the Montague town ballot to close the Montague Center School (grades K-3) in order to save money. This resulted in a hostile and divisive political contest that drew high levels of stakeholder participation on both sides, similar to the Indians mascot debate. A parent I interviewed called it a “you-know-what-show” and said “people were fuming mad, FUMING mad” (interview, November 2016). The town voted to close the school, which it did in June 2008, and all students were reassigned to Hillcrest and Sheffield.

Prior to the consolidation process, the district had two elementary schools perceived as high performing, and therefore desirable for families: Gill ES and the Montague Center School. Aggregate measures of academic achievement and attainment more often reflect the
race and class of a school’s student body versus the strength of its instructional program (Zhang & Cowen, 2009), and this was reflected in the GMRSD elementary schools at the time. In 2007, these two schools were almost exclusively composed of white students, and had much lower proportions of English learners, students with disabilities, and low-income students compared to Hillcrest ES and Sheffield ES at the time. See Table 4A for 2007 enrollment characteristics across GMRSD elementary schools.

Table 4.1: Enrollment in GMRSD Elementary Schools, 2007*

<table>
<thead>
<tr>
<th>Subcategory</th>
<th>Gill ES (103 students in grades K-6)</th>
<th>Montague Center ES (86 students in grades K-3)</th>
<th>Hillcrest ES (173 students in grades PK-2)</th>
<th>Sheffield ES (255 students in grades 3-6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>96.1%</td>
<td>96.5%</td>
<td>84.4%</td>
<td>87.5%</td>
</tr>
<tr>
<td>English Learners</td>
<td>0%</td>
<td>0%</td>
<td>3.5%</td>
<td>2.4%</td>
</tr>
<tr>
<td>Students with Disabilities</td>
<td>0%</td>
<td>16.5%</td>
<td>22%</td>
<td>19.6%</td>
</tr>
<tr>
<td>Low-income</td>
<td>27.9%</td>
<td>25.2%</td>
<td>49.1%</td>
<td>56.1%</td>
</tr>
</tbody>
</table>

* MA DESE School Profiles, 2007

The closure resulted in family flight. Most families in Montague Center elected to engage in school choice rather than move to the other Montague schools. This included enrolling their children in Gill ES (which helped this school by dramatically increasing its size), enrolling in other public schools through intradistrict school choice (which drained resources from the GMRSD through tuition payments to these other districts), or enrolling in a private school or homeschooling (which resulted in a loss of state aid) (Gill CoE Report, 2009). These choices align with other findings that parents seek whiter and wealthier schools for their children if given the option (Billingham & Hunt, 2016; Holme & Richards, 2009; Rabovsky, 2011; Saporito, 2003; Welsch, Statz, & Skidmore, 2010), although no data suggest that parents in this situation gave that as a reason. Instead, data point to relationship damage
as a primary reason parents gave for disconnecting with the Montague schools, or with GMRSD schools altogether. For example, a parent wrote on a GMRSD survey in 2014, “We chose to choice out rather than stay in a vindictive, foolish situation run by a completely dysfunctional school committee.” This was not an isolated comment among survey respondents that year.

In 2011, DESE created a report on the GMRSD when it was rated “Level 4.” It cites this school consolidation process as having had a significantly negative impact on the district: “Interviewees repeatedly stressed that continuing bitterness over the closing [of the Montague Center School] affects many aspects of district operations, but particularly has effects within the school committee and among Montague Center parents.” The report also confirms the school choice patterns described above. This incident was part of a history of contentious and non-productive budget negotiation processes between the towns and the GMRSD that were also described in the DESE and Gill CoE reports. In other words, closing the Montague Center School, which was intended as a fiscally responsible move for the district, caused political upheaval and relationship damage that negatively affected its financial resources. By driving large numbers of comparatively advantaged families away, the district’s academic performance and reputation also suffered.

The DESE and Gill CoE reports confirm perceptions among my interview participants that “most” of the families in Montague Center are disconnected from the GMRSD, and continue to enroll their children in other schools (interviews, October 2016-April 2018). Several parents cited this as a reason for leaving on surveys the district conducted in 2014 (e.g., “School Committee closed our neighborhood school. The level of hostility toward our high performing school was toxic”). This politically contentious and
hostile process damaged relationships to the point where many people were still mentioning it to me, unprompted, almost ten years later.

**Increasing Diversity and Student Need**

As described in Chapter 3, the student population of GMRSD schools had become increasingly racially, socioeconomically, and linguistically diverse. No longer was the GMRSD population homogeneously white and working-class, as it had been for generations. This had resulted in a diversity of perspectives about schooling and community, for which many expressed appreciation, but which also resulted in conflict as different groups’ needs, expectations, and preferences bumped up against each other. For example, the needs and preferences of an immigrant family from Central America may be significantly different than those of an upper-middle-class white family from the local area with a child who has a diagnosed learning disability. Differing family needs also resulted in disconnect from the district if the GMRSD community was not perceived as being able to meet them.

**Racial and ethnic diversity.** While white, working-class families who have lived in the area for generations continue to represent the majority, there were increasing numbers of people of color whose life experiences and world views differed from what had been traditional. This has been a welcome change for many, including long-time residents. For example, an interview participant who had grown up in Gill and attended GMRSD schools, and whose daughter was a student in 2016-17 confirmed that the area was not at all diverse from her perspective when she was young (“We were all white people”), and that she appreciated the increased racial diversity that her daughter had been able to experience (interview, April 2018). Another parent who had attended GMRSD schools as a child talked to me about the increasing population of Spanish-speaking immigrant families, and said, “We value them so much!” (interview, April 2018). An elementary school parent who
responded to a survey in 2017 wrote in response to a question about school strengths, “I love the diversity and culture that is Gill/Turners/Montague.”

However, for some, the majority-white student population was not diverse enough, and this was a reason to choose another school. For example, on a 2014 survey, one parent explained the reason for choosing a school outside the district as, “Wanted a school system with more racial and ethnic diversity.” A parent I spoke with who is white, and whose children are black, explained that they had chosen another school in a more racially diverse town because she did not want her children to be especially noticeable because of their race (interview, October 2016). There were other reasons for her choice, but having a racially diverse community for her children was important to her, and this was not available to the same extent in the GMRSD as in Greenfield. While this particular parent did not perceive a problem with discrimination in the schools, other parents who responded to surveys in 2017 did. For example, a Sheffield ES parent commented simply, “Racism, low expectations.” These personal experiences are indications of an increasingly diverse set of students and families who have differing perspectives on race and the racial composition of a community.

Affordable housing and business properties in Turners are attractive to a growing community of immigrants. An interview participant who had grown up in Montague and whose children attended GMRSD schools referenced the increasing numbers of Spanish-speaking immigrants who were moving in. When I asked her why they were attracted to the towns, she said, “I honestly think the schools make these people feel safe,” and cited a former GMRSD English learner director who had made a special effort to ensure these families felt included and welcome (interview, April 2018). In January, the GMRSD

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8 Racial diversity is relative in this part of Massachusetts. In 2016-17, GMRSD’s white student population was 80.4 percent, compared to Greenfield Public School at 75.8 percent.
superintendent published a statement of support for immigrant students in English and Spanish on the district’s website and Facebook page, and reported at a school committee meeting that the district’s Spanish language liaison and secondary assistant principal (a native Spanish speaker) were meeting with families to offer support (SC minutes, February 2017).

An administrator in a nearby district said that his school enrolled the children of Salvadoran and Mexican crop pickers who came to work on area farms and then overstay their H1B1 visas. He also said there was a large community of Moldolvans, and he thought the churches played a social networking role in that community by bringing people together. He said, “You know, they say, ‘Don’t go to New York City, come here to Massachusetts...there’s a guy who owns an apartment complex, and he’s trustworthy,’ and...it’s the same for every immigrant population.” He said the eastern European immigrants were a classic case of immigrants who do really well in the area, and that part of the reason they’re so accepted is that they are white (interview, October 2016). This observation indicates some racial tension in the GMRSD community.

**Socioeconomic diversity and gentrification.** The district had traditionally been associated with working-class people. The GMRSD school committee chair, who had lived and worked in the area for 30 years, described his perspective on an entrenched cultural pattern he noticed of residents feeling that they were looked down upon by others. He called this a “having a chip on the shoulder” mentality, and at one point said it was “the Turners gestalt” (interview, November 2016). When I asked exactly what he meant, he said that people tended to have the mindset that others assumed they were inferior (“Anything you want to change, you want to change it because you think I’m stupid”). The chair also said that this pattern occurred internally among the Montague villages and neighborhoods, and that the downtown area of Turners is often cited as a negative comparison for other places
to feel better about themselves (“We have problems, but at least we’re not Turners Falls!”).

Other participants told me that that there is a social hierarchy with lower-income sections on the bottom (Turners Falls, Millers Falls, The Patch), and higher-income sections on top (Montague Center, The Hill). These descriptions indicate that members of the community have internalized class-based social stratifications.

On the positive side, Gill, Montague, and Erving are seen by many as being highly community-oriented. One school committee member told me that they had looked for a long time to find a community like the one they had found there, and had intentionally moved to Turners Falls for that reason (interview, April 2018). An interview participant who had grown up in Gill and attended GMRSD schools said, “It’s a good place to bring your kids up” (interview, April 2018). She confirmed that there had been a long history of residential stability, and that the area was not at all diverse from her perspective when she was young. I asked her who was moving in, and she said, “I see a lot of low-income city folk moving here from Springfield and whatnot.” When I asked why she thought this was occurring, she cited the plethora of affordable housing, and local recreational activities. She added, “But also there’s all the...I don’t know the word...all the more earthy, Northampton-y, hipster-y...I don’t know...” I interpreted this as a reference to the gentrification wave. When I asked her why this was happening, she said, “People like Turners. They’re wanting to start little businesses. [...] I think trying to start lots of little Northamptons.”

People see these towns as attractive and accessible, and intentionally locate their families there. Many interview participants explained that these types of newcomer families who contribute to gentrification tended to cluster in Montague Center, and that many of them enroll their children in other school districts through various school choice options. These families have the means to transport their children outside of the district to schools of
choice or charter schools that do not offer transportation. Some could afford private
schools, or to live in other towns that have public schools with better reputations than those
in the GMRSD. Some families whose children attend schools outside the GMRSD continue
to be involved in community activities, some of which involve the schools (e.g., attending
the secondary school musical production).

Increasing levels of student need. In contrast to this privileged group, there were
many references to parents who were personally unable to engage in the schools, or
sometimes even in parenting, due to their own personal challenges. Franklin County has
been affected by the national opioid epidemic, and many people who are struggling with
addiction and its attendant effects live in the GMRSD towns. GMRSD employees who were
familiar with students’ home lives described patterns of parental drug use that resulted in
unstable housing and neglect, and often resulted in governmental social services involvement
and foster care. A school staff member described young people who “basically take care of
[themselves]” and each other, many of whom live in tight-knit communities in downtown
Turners and The Patch, that are enabled by the dense proximity of apartment building living
(interview, October 2016). Another said that there were families in town that took in a lot of
foster children in order to maintain income (interview, October 2016).

The secondary principal explained that “there’s a parent/guardian/caregiver group
who, for a variety of reasons, are just not able, or maybe willing to step in to let us know
what they’re thinking.” She added that “poverty, addiction, divorce, incarceration [...] those
kinds of issues in families really pull a lot of people from being the kind of...being able to
engage in a way that would help support students and help support the school” (interview,
April 2018). She confirmed that a noticeable number of their families were not able to
engage. Along these lines, a TFHS staff member told me that the perception among school
psychologists in the area is that Turners Falls has always had the “worst reputation for
domestic violence,” and that “it’s one of the highest for opioid [use], and it used to be meth
drug addiction” (interview, October 2016) Another school staff member told me that many
students on her caseload were in unstable housing situations, and that the school had a lot of
students transitioning in and out as a result (interview, November 2016).

As evidenced by these interview comments, the GMRSD student population has
increasing levels of need that require additional resources and attention. DESE defines “high
need” students as those who are English learners, economically disadvantaged, and/or have
an identified disability because these groups require additional resources such as specialized
teachers (e.g., English as a Second Language, special education), counseling staff (e.g., school
social workers), and substantially separate programs for the most intense levels of need (e.g.,
the GMRSD’s “therapeutic” classrooms). General education teachers also require new skill
sets and knowledge to serve these students well, as the majority of them are included in
general education settings most or all of the time, even if they receive additional supports.

While resources that support these types of need were provided in the schools (to
the extent possible), the GMRSD staff members with whom I spoke conceptualized student
need somewhat differently. To them, high-needs students were those who were living in
unstable home settings, sometimes with parents who were struggling with drug and alcohol
addiction, and were experiencing adverse effects of poverty and neglect. These students
often have childhood trauma experiences that are increasingly understood in the educational
community to affect brain development, and this results in difficulty engaging in school,
learning, and being in relationships with others. These students are not always identified as
having a disability that would require special education services, and therefore they rely on
general education teachers to meet their complex needs.
These students and their particular needs are noticeable in the schools. For example, the school social worker’s door in the high school had a printed resource flyer taped to it at eye level that said, “Drug and Alcohol Addiction Treatment and Recovery Resources” at the top, and a logo with the words “OPIOID TASK FORCE” at the bottom. The pages were crammed with information in a tiny font. Above that was a handwritten sheet of white copy paper that said, “Agencies that might help: CHD, CSO, CRISIS!, Dial/Self, Service Net” with a phone number under each one. In a little bubble to the side it said, “Or ask me” (observation, November 2016).

Many of this type of student had unstable home situations that frequently resulted in residential mobility, and this was noticeable to administrators in terms of district enrollment. Students who were constantly being placed in different foster care settings in different towns, parents who lost their jobs and needed to move in with family members, or—as a counselor explained—parents who moved around to escape abusive relationships or anxiety-producing life situations, generated a high degree of “churn” in school enrollment in the GMRSD schools (interview, November 2016). The superintendent described an enrollment pattern he noticed:

Like […] from one June to the next, if there are, let’s say four fewer students and…you know going from fourth grade one year to fifth grade the other, you might think, “OK that’s the story.” Well, one of them moved out of town and two of them went to charter schools, and one of them went to choice. But it’s not like that. What’s more likely to happen is that there were about 17 families that moved out, and 14 that moved in over the course of the year. (interview, December 2016)

Aside from enrollment changes due to intentional school choice, which tend to occur from one year to the next, this shows that many students were changing residence between towns at multiple points during a school year, and not necessarily by choice. The secondary principal told me that this ever-changing group of young people has “a big impact on who we are” (interview, March 2018).
In their conversations with me, school administrators and staff members often associated the GMRSD with these types of high-needs students. For example, in a discussion about how some schools find an identity niche for themselves, the secondary principal wondered aloud, “Why can’t we be the school that succeeds with high-needs kids?” (interview, December 2016). Staff members told me many stories about students who were dealing with terrible home situations. A teacher said to me, “It runs deep what’s going on here. There are generations of neglect” (interview, October 2016). This teacher also said she “went home crying every day for the first three months” because she was absorbing all of the “negative energy” of the students’ personal problems. She told a story of a 19-year-old student who had a tattoo of her name across her neck because her uncle held her down and gave it to her. She said she spent a lot of effort trying to be as positive as possible with this girl because her life was so negative, and that the girl approached her in the hallway one time and made a point of telling her how nice she was to her. She said this girl did not end up passing her class, but that she voluntarily came to do work for three hours on the last day of school even though she knew that there was no way she could earn credit (interview, October 2016). This story indicates the role teachers play in students lives as caring and supportive adults, perhaps some of the only ones they have.

Another teacher described how her high school classes clustered together in small classes significantly disengaged students and those with behavioral problems in order to support them well, but also to remove them from other classes where they could disrupt others’ learning (interview, October 2016). This structure focused attention on their intense needs, but concentrated unsuccessful students and put more attention on them. She gave an example of a ninth grade science class she had in the prior year. The following is an excerpt from a fieldnote of an interview with her that was not recorded:
There were 12 students in the class: four were in foster care because their parents were either addicts or “dead already,” two dropped out that semester (one was 16 and the other was 18), three were “ready to learn,” and the remaining three “had the will to enjoy the class sucked out of them by everybody else.” She says that the disengaged students “steal the show” because their behavior is so disruptive. She then compliments the school’s efforts to support these students, and says that all the adults in the building, including administrators, are doing “an amazing job” trying to help them. She empathizes with the students’ perspective by saying, “They have no reason to trust any adult, let alone the person responsible to educate them,” and that they’re always in “fight, flight, or freeze” mode due to their trauma histories. I ask about an 18 year old who was in the 9th grade that she had referenced earlier, and she says that he had moved into the district that year from out of state, and had been homeschooled to that point, but had been living with the other parent. (fieldnote, October 2016)

These stories illustrate the intense needs of some of the students enrolled in TFHS.

The elementary schools also have students with these types of needs. For example, there was a highly visible news story that circulated in 2015-16 in which parents charged the Hillcrest ES of having an abusive “Calm Down Room” procedure that harmed their child. While the district was thoroughly investigated and cleared of any wrongdoing, the school does have a space dedicated for use by students with intense behavioral issues who become too agitated and disruptive to keep them in their classrooms with other students. Parents notice these students, and commented on disruptive student behavior in their responses to district surveys:

Sheffield does not seem to be [providing] enough support for teachers when dealing w/children with behavior and/or attention problems. This results in students who are available to learn losing out when these other students hijack their learning time. (parent of multiple GMRSD students, 2017 survey)

There seems to be a very large number of students with behavioral/educational needs that require attention from the classroom teachers and many resources from the school and that creates an environment that may make it harder for other students to learn in. (Sheffield ES parent, 2017 survey)

Overall, lack of discipline & expectations. Too many “out of control” students.
Disrupts learning environment. Main reason why so many families choose out of district. Climate is scary to older & younger children. (GFMS parent, 2017 survey)

These comments indicate that, in addition to staff members, parents and students associate GMRSD schools with noticeable populations of high-needs students. Some also imply this is a reason families choose to leave district schools. While educators see these students as challenging, yet worthy of attention and support in order to facilitate their success, some parents connect these students to a diminished school experience for others, especially their own children.

**Demographic differences between elementary schools.** The demographic differences between Gill ES and the Montague elementary schools (Hillcrest and Sheffield) came up several times in my data gathering. As described in Chapter 3, the student body of Gill ES is whiter and wealthier than that of the two Montague elementary schools. In addition, they have fewer students with disabilities, and had no English learners in 2016-17. This represents a more traditionally advantaged population in terms of school success, and this results in differences in programming. For example, every year all students in one of the older grades at Gill ES (and Erving ES, although it is a separate district) go on a days-long overnight field trip to an outdoor education program called Nature’s Classroom. In contrast, Sheffield ES students do not. The school committee engaged in a discussion about this discrepancy over three meetings during the 2016-17 year, but did not resolve anything. The general consensus among interview participants was that Sheffield ES does not have the capacity to raise the funds necessary to afford the trip, either by parent financial contributions, or time and energy to fundraise. Differences in student experiences are thus tied directly to the relative advantage of their families.

Demographic differences between the schools also affect school enrollment decisions. One parent said that Gill ES has a reputation as a school that students choice into
from Montague through intradistrict choice, or from other towns through interdistrict choice. A large percentage of their students (approximately 40 percent according to some sources, including a Gill Commission on Education report, and a DESE report on the district’s Level 4 status) do not live in Gill. A parent interview participant who lived in Turners Falls called intradistrict choice from Montague into Gill ES a “white flightish thing” and added that “they want to be apart from us” (interview, April 2018). Gill ES has the most traditionally advantaged student population in the district, and is the only one rated Level 1. It is also the only one that has a net gain in students from school choice.

**Culture clashes.** Demographic shifts within the district had resulted in a clash of cultures of sorts. Longtime residents (mostly white and working class) were being joined by low-income, urban families looking to get out of the city, young, educated middle-class progressives looking for business opportunities or cheap apartments, and middle- and upper-middle class families looking for community-oriented environments in which to raise their children. In addition, the opioid crisis had generated poverty and unstable life conditions associated with drug addiction, and these families could find affordable housing, or had relatives in the towns and were living with them while they patched their lives back together. There were also “professional” foster parents who routinely took in several children at a time (interview, October 2016). Each of these groups came together in the GMRSD schools.

**Unstable Finances**

Lack of financial resources was a perennial problem in the GMRSD, and this appeared to be getting worse in 2016-17. Problems included state funding that was not keeping up with costs, declining enrollment brought on by population decline, and increasing school choice, which removed revenues from the system through tuition
payments or lost revenue. An unexpected Medicaid reimbursement problem that was discovered in May 2016 saddled the district with a huge amount of debt, and this exacerbated an already difficult situation in which there was nothing left to cut out of the budget. All of this contributed to stakeholder anxiety about the district’s viability, which possibly contributed to increased family flight. In addition, the current financial problems and organizational leaders’ efforts to manage them triggered many stakeholders’ memories of a highly contentious process to close one of the district’s elementary schools that occurred in 2007 that was also related to a lack of financial resources. I describe the various resource problems below.

**Inadequate state funding.** There is a widely-held perception among public school leaders in Massachusetts, including the GMRSD superintendent, that the state does not provide adequate “Chapter 70” funding for public schools to do the work they are expected to do regarding student achievement and attainment (e.g., MA Rural Schools Coalition presentation, April 2017). This shifts more of the burden of paying for education to local municipalities that have other competing demands on their tax revenue. In order to make up the difference, GMRSD is forced to cut costs, and/or request that its member towns vote to increase the amount of money they provide, which can involve an increase in property taxes. In February 2017, the committee was informed that the towns’ share of education funding would likely increase due to rising property tax revenue from the local electricity provider that would affect the state’s funding formula (SC meeting minutes, February 2017).

An advocacy group called the Massachusetts Rural Schools Coalition (of which the GMRSD superintendent was an active member) consistently promoted the idea in the local media and at the state level that rural schools were at risk for financial instability due to flat
state aid, declining student enrollment, and increasing costs. For example, The Daily Hampshire Gazette published a story that explained this position. It read in part,

Close to a dozen educators met at Mohawk [Trail Regional School] on Tuesday to review the case for why the state should raise Chapter 70 funding for rural schools with declining enrollments for the last two decades. “Mohawk lost 40 percent of its enrollment over the last 15 years,” said Superintendent Michael Buoniconti, chairman of the Massachusetts Rural School Coalition. “Our state aid has been flat, but 60 to 70 percent of our budget is based on [employee contracts], which are not flat,” he said. “Our per capita income is low, and the costs fall on our residents.” After noting that rural school districts spend more money per student than those in urban areas, he added, “Most of us cannot afford $20,000 per student. If we’re not in crisis now, we’re going to be in the next four to five years. (Daily Hampshire Gazette, September 2016)

This advocacy group published a report called “Crisis in Rural Massachusetts: A Proposal to Establish Rural School Aid” in October 2016. It outlined the financial problems of rural school districts in the state listed above, all of which the GMRSD was experiencing.

In May 2017, a Gill finance committee member submitted a letter to the GMRSD school committee that outlined the history of budget cuts in the district that were intended to keep the overall budget at levels that would not force the towns to increase their contributions to the schools. She expressed her significant concern that this pattern was not sustainable, and would soon result in some drastic consequence such as shutting down the schools or regionalizing with another district (SC meeting minutes, May 2017).

Regionalization had been a persistent threat, as well as a constant recommendation from DESE, which claimed that there were too many school districts in the western part of the state, and were constantly offering financial incentives in this area (e.g., Gill Commission on Education report, May 2009).

**Loss of resources from school choice.** Charter schools, interdistrict school choice, and vocational-technical high schools all divert significant state and local funds from the GMRSD when its resident students enroll in them, and force it to adjust its budget
accordingly. Students who enroll in private schools and homeschooling are not counted when the state calculates foundation budgets, and therefore represent “invisible” losses. As explained in Chapter 3, the GMRSD loses a high percentage of its potential “default” resident students to various choice options, and this represents a significant loss of resources. These losses accumulate yearly in a steady trajectory of increasing numbers of families who choose to leave. In 1990, 85 percent of resident students in the district enrolled in the local schools. In 2015, only 59 percent did. Coupled with a 20 percent decline in the total population of students over this time period, this represents a significant loss of human and financial capital. The GMRSD school committee voted each year to participate in the state’s Interdistrict School Choice Program in order to be able to accept students and recoup some of their lost state funding, but they were always on the losing end of the equation. In 2016-17, the district paid out over $1.6 million in school choice costs, and their entire operating budget was just over $20 million.

The school committee chair described how difficult it had been to have standards-based accountability reforms and school choice reforms occur simultaneously. From his perspective, these were twin pressures that worked at cross-purposes. He described a pattern of students in the marketplace choosing schools based on which ones had art and music programs. These were programs districts felt they could cut because they were not part of the state’s accountability system; however, cutting them to divert resources to core academic areas led to family exit. From his perspective, this set up a vicious cycle in which cuts led to declining student enrollment, and thus fewer resources to provide the things they were looking for. He imagined what he assumed families were thinking when he said,

“Well, I’ll choice over to Greenfield ‘cause they still have art and music,” and then they come back because we’d put art and music back in, and [Greenfield] had to cancel art and music. So, that was the story, school choice was more of a reaction to
a change in services or offerings in a district, and if you coulda kept the offerings, you woulda.”

He went on to say,

[…] usually we’re losing students because of a decision we had to make that we didn’t want to make in the first place, and never woulda made if we coulda helped it, so I don’t think there’s… I don’t think the committee in general, and I can’t speak for other committees… I don’t know what they do, but I have a feeling that we’re not uncommon. (interview, December 2016)

This illustrates the financial bind small, rural public school districts feel they are in with regard to school choice. From their perspective, public education funding mechanisms transfer money to other schools, which prompts cuts to staff and programs not directly related to state accountability requirements, which then prompts parents to select the schools that have not yet made these cuts. This is a vicious cycle they feel they cannot avoid in the current policy environment.

In separate interviews with the superintendent and school committee chair, I mentioned that the topic of my research was how schools behave in competitive environments. Income loss was the first thing they both mentioned. When I asked where he would like to start our conversation, the school committee chair said, “Well, you asked how we engage with the challenge of school choice, charter, slash, slash, slash, and…uh…well, we lay a lot of people off” (interview, November 2016). Before we even started talking, the superintendent leaned back in his chair and said, “Well, a huge thing is the money.” He went on to say,

So it has a really big impact. Right now we lose about $800K through school choice and about $800K through charter school programs. And in a $21 million budget is a lot of money. And […] the impact with losing kids through charters is, you know, much higher than it is with choice. It’s over $12,000 per student. (interview, December 2016)
He consistently referenced the negative financial effects of school choice policies, and was especially critical of the charter school funding formula that transferred the entire per-pupil amount (minus some reimbursement) away from the district.

In addition to school choice funding mechanisms that were perceived to be draining the GMRSD budget, there was a question on the Massachusetts state ballot in November 2016 about increasing the number of charter schools in the state. Political tensions were running high when I conducted these interviews. While the GMRSD superintendent was consistently critical of the funding mechanisms, he never challenged the pedagogical aspects of charter schools, which was in sharp contrast to other superintendents in the area. For example, in March 2016, he shared with the school committee a letter he had written to the editor of the Boston Globe that outlined the detrimental effects of the charter school funding formula on their district as he perceived them. The final sentence read,

Our district is open to learning lessons from area charter schools, and in fact we have a program that brings area charter high school students to work with some of our elementary students. But while we may engage in partnerships over pedagogy, make no mistake, we are already polarized by funding. (SC meeting minutes, March 2016)

In contrast to the idea that competition spurs improvement, this indicates that it had instead resulted in political divisiveness, and this was on full display in the state during the 2016 election season.

The superintendent’s criticism of the financial aspects of charter schools was expressed to me by other school committee members as well, perhaps due to his influence. For example, after arranging a meeting with one of them, she sent me a link to the district’s Facebook page and this post, which was the text from a radio spot the superintendent had recorded and aired on a local station:

WHAI 10-21-16 Message: With the question of expanded charter schools on November’s state ballot, there has been lots of contradictory information tossed
around about charter school funding. Here is Gill-Montague’s experience. Last year 70 of our resident students attended area charter schools, which is an average of five students per grade level. To help finance these charter schools our district’s state funding was reduced by a net amount of $859,000. This is [sic] represents almost five percent of the district’s total budget. While it might sound logical that the district simply reduce its spending to mirror these losses, it is critical to understand that school expenses do not work this way. Losing five students per grade level across multiple schools does not allow us to reduce health insurance costs, utility bills, transportation costs, custodians or nurses. And only occasionally can we reduce classroom teaching positions without ballooning class size or eliminating essential courses. All of this means that charter school funding cuts are causing us to experience highly impactful reductions in our ability to challenge and support every student. (GMRSD Facebook page, October 2016)

The argument outlined in this post was typical of the superintendent’s communications on the issue, and is directly related to the financial issues described above.

Financial losses from school choice were placed front and center in GMRSD school committee meetings and materials provided by the superintendent and director of business and operations during 2016-17. This included several mentions of lower-than-expected Erving tuition payments. GMRSD elects each year by school committee vote to accept interdistrict school choice students, which means additional revenue, but the balance is always significantly in the red (e.g., a net loss of 117.2 students and $588,551 in FY17). The district lost seventy students to charter schools in 2016-17, for a financial loss of $1,026,390. Not mentioned were losses related to the 69 students who enrolled in the Franklin County Technical School, although this also diverted over $1,000,000 in revenue, nor was it pointed out that 77 students enrolled in private schools or homeschooling, further reducing state revenue. Interestingly, one problem that was never directly referenced in the context of school committee meetings, but was highlighted in participant interviews, was the idea that school choice regulations favor advantaged students, thus concentrating disadvantaged students in GMRSD schools. I discuss these patterns of relative advantage in the section on the element of community engagement.
**Medicaid debt.** On top of all their financial concerns, the district discovered in early May 2017 that they had been billing incorrectly for Medicaid reimbursements for several years, and owed hundreds of thousands of dollars in back payments. They first discovered this when their Medicaid support vendor told them to expect significantly less in reimbursements for the current year ($130,544 less than the $500,000 budgeted amount), and that estimated reimbursements for the following year would also be far less than they had budgeted (~$160,000 less). It was not until October 2017 that the district learned the full extent of its financial problem. An article in the Greenfield Recorder started, “Due to a five-year billing mistake, the Gill-Montague Regional School District owes the federal government more than $900,000 in past Medicaid reimbursements the district should not have collected” (Greenfield Recorder, October 2017). While it became clear relatively quickly that the mistake was not due to mismanagement within the GMRSD, this debt added an unexpected burden to a system that was already stressed.

**Nowhere left to cut.** Over the years, including in 2016-17, the superintendent voiced his intention to prioritize maintaining small class sizes and academic programs despite declining enrollment and income, but was transparent about how this affected other priorities. A Greenfield Recorder article about the preliminary FY18 budget from January 2017 stated that his goals were “keeping class sizes low, keeping existing programs, improving student readiness to learn and literacy achievement.” The article went on to quote him as saying, “[W]e knew we needed to make some really difficult reductions. [...] Again, they’re not going to impact the experience that students have to a large extent, but they are going to definitely impact our ability to make improvements in the areas I mentioned.” The school committee chair explained to me that the district’s long history of preserving student programs (e.g., arts, AP courses, athletics) by skimping on central office administrative staff
had resulted in the inconsistencies and mismanagement that they were currently trying to address (interview, March 2018). The Gill finance committee member who warned that the district was on a collision course with closure or regionalization ended her May 2017 letter to the school committee with, “There is nothing left to cut that will allow us to provide an acceptable level of education for our children” (SC meeting minutes, May 2017).

**A reputation as being financially unstable.** As a result of years of budget cuts that became increasingly noticeable to the wider community, the GMRSD now had a reputation as being financially unstable. Perceptions of inadequate resources increased stakeholder anxiety about the stability of the GMRSD, as well as perceptions that the programs were inadequate compared to nearby schools. In 2014, the Superintendent’s Entry Report and survey of parents who left the district both contain evidence that GMRSD stakeholders perceived lack of resources as a noticeable problem. A typical narrative response on the 2014 parent survey states,

> Know that the teachers in this district are good teachers but with no funds to do their job properly. I decided to choose a school that had the funds necessary to provide arts, music, language and who promoted a love and respect for the outdoors. I don’t regret my decision. (parent who left the district, March 2014)

Respondents to the June 2017 parent survey confirmed perceptions of resource problems in the district. Their narrative comments mentioned budget cuts and noticeable lack of funding. Some parent survey comments compared the perceived level of district resources to other districts, such as when a current Sheffield ES parent said, “The school does not have enough money to give students the same opportunities as other schools in the area/state.” There were several comments about fears that the district was in danger of losing viability, and that fiscal sustainability was a serious concern. In most instances, this fear was generalized, but a current Gill ES parent conveyed that “there is a looming rumor out there that Gill school is on the chopping block. To be phased out.” Parent survey
comments in 2017 also include references to declining enrollment, and the reduction in resources this implies. For example, a current TFHS parent wrote, “Sports programs will not exist in a couple of years due to lack of enrollment,” and a current parent of students in multiple schools expressed, “At the High school level - I am worried about the lack of variety of available courses for my kids to take. It feels like staff and course offerings are being whittled away due to budget issues.” These comments show that a persistent lack of resources was perceived by parents as an ongoing issue the district, and that things were becoming worse, not better.

While the Montague Center School closing and related budget process breakdowns between the GMRSD and the towns in 2007-08 (described earlier) often came up in the context of the mascot issue due to parallels in the level of hostility among stakeholders, these incidents also contributed to the district’s reputation as being financially unstable. The Gill CoE report describes the interlocking effects of financial concerns, state accountability requirements, and town/district governance:

The spiraling cost of education has done much to create an adversarial environment between town government and the District. The FY 2008-2009 budget cycle produced an unusually divisive budget battle between the school district, the towns, and the state. The School Committee set a budget that represented a substantial increase in Gill’s assessment. Both Gill voters and Montague Town Meeting members voted down the budget. This prompted a district-wide meeting (the second year in a row), where voters again voted down various modified budgets. An amended budget was adopted at a second district-wide meeting. This budget was rejected by the school committee, however, which argued that the budget approved by the District meeting would have required significant and devastating cuts at a time when the school was trying to turn the District around and address the loss of students and revenue through school choice. The State Commissioner of Education then moved in and set a budget that resulted in a 5.7% increase in Gill’s assessment from the prior year. Even with the additional funds from the State mandated budget, the School Committee reported that they were still not able to fully implement their Turnaround Plan. The State provided an additional $10,000 in aid to Gill to help offset the budget increase. Nonetheless, the combined impact of the State mandated school budget and the costs of town services necessitated a Proposition 2 1/2 override vote. (Gill Commission on Education Report, 2009)
The Proposition 2 ½ override references a MA law that states that towns are not allowed to increase their property taxes more than 2.5 percent without a vote to do so. People in the town were upset that they paid more every year for a school system that seemed to be getting worse.

The DESE “Level 4” report identifies financial instability as a major barrier to district improvement, not due to a lack of resources, but due to a breakdown in the relationship between the school committee and town officials in the budgeting process (DESE, 2011). The report attributes part of the breakdown to ongoing budgeting conflicts related to town government officials’ negative perceptions of the district, and lack of trust related to resource allocation that were primarily attributed to administrative spending increases with which they did not agree. Contentious relationships between the district and towns had resulted in several years in which the towns rejected the school committee’s proposed budgets, as described in the Gill CoE report quote above. The DESE report also states that there was evidence that some participants were intentionally unwilling to resolve fiscal issues in order to continue to access additional state financial support that was offered in the midst of this turmoil.

Since that time, GMRSD organizational leaders had worked to improve the situation. The 2016-17 school committee chair described to me the state intervention process that resulted from years of failed budget negotiations as described above. He described this as the state telling them, “Well it’s not that we’re not giving you enough money, it’s that you’re spending it wrong. You’re the problem” (interview, November 2016). While it may be true that it felt as if the state was not sympathetic to their financial woes, this led to them developing a Compact for Funding Education, which was signed by the towns, the GMRSD, DESE, and three state legislators in 2010.
The chair said that this Compact had resulted in a more cooperative and proactive budgeting process, and that the towns had not rejected a budget outright since that time (interview, November 2016). The 2014-17 GMRSD strategic plan contained an initiative to “Develop district budgets with input from and ongoing communication with civic leaders,” and the current superintendent reported to the school committee on his efforts to have “cordial” relationships with town government representatives (SC meeting minutes). Solving some of their financial problems, it seems, were related to relationship building as opposed to devising and adopting fiscal strategies.

**Community Engagement, Relationships, and Reputations**

In a competitive market environment, stakeholder engagement and school reputations are key components of organizational survival. Aside from its reputation as being financially unstable, there are competing perceptions of the GMRSD schools and communities that affect stakeholder engagement and school enrollment decisions. Many of my interview participants cited the positive aspects of the schools and community as a whole as a reason they chose to live there, and/or were choosing to remain engaged in GMRSD schools. As described above, the strong and successful athletics program engenders an abundance of school pride, and engages large segments of the community as players, fans, and performers. On the other hand, the towns and schools struggle to manage poor reputations regarding academic achievement that have persisted through the decades and are passed down through parents’ social networks. In addition, the physical attributes of the villages of Montague and the towns of Gill and Erving contribute to people’s assumptions of the schools, some of which are at odds with the reality of what people find when they are actively engaged.
**Preconceived notions of poor quality.** Some GMRSD teachers who did not live in the district told me that they had heard about the schools’ poor reputations prior to working there. When I asked one where this idea came from, one said she had driven down the main street of Turners Falls, and “pictured a crumbling Turners Falls High School building, you know, I mean not a lot of resources. And I got here and was really pleasantly surprised” (interview, October 2016). Another teacher who had worked in the district for several years said that she had “preconceived notions about this district before [she] came here,” and a “gut feeling” that others had them too (interview, October 2016). Run-down landscapes in some heavily-trafficked parts of town contribute to assumptions that the schools are of low quality, especially the long row of abandoned mills, and cluttered low-income housing projects in The Flats. The Victorian homes on “The Hill” are associated with relative wealth, yet there are no schools located in this neighborhood that would benefit from the association. Gill’s rolling farmland and open spaces have a pastoral beauty that contributes to perceptions about the relative quality of Gill Elementary despite the fact that many families in this farming community are economically disadvantaged.

The school committee chair told me that when he and his wife moved to the area in the early 1990s, the realtor told them they didn’t want their kids to attend the GMRSD schools (interview, November 2016). A school committee member who works in real estate confirmed this perception among area realtors (interview, April 2018). The chair said that he thought this perception derived from “when it was a mill town, and there was a bar in every other storefront, and it was a pretty rough place” (interview, November 2016). People also make assumptions about the GMRSD schools based on the exterior appearance of their buildings. The TFHS/GFMS building recently underwent a major renovation/rebuild, and is surrounded by well-maintained athletics fields. Perhaps it should not be surprising that many
stakeholders appear to be concerned about the state of these outdoor facilities, as they contribute positively to the schools’ reputations. The GFMS/TFHS building has a swimming pool, which is extremely unusual for schools in western Massachusetts, and a state-of-the-art theater. In contrast, the Sheffield and Hillcrest buildings are housed in aging brick buildings that appear dated and in need of repair. One school committee member described to me her surprise when she first stepped inside the Sheffield ES building, and “it was amazing” (interview, April 2018). She explained that she had not expected to be impressed based on assumptions she had formed by driving by the building.

**A positive and supportive community.** Several interview participants who had direct experiences with GMRSD schools were highly complementary about the community. One school committee member said that she and her family had looked for a long time for a community like this one, and she could not have been happier (interview, April 2018). A new TFHS staff member said, “It’s a really lovely community in a way that’s easy to apprehend” (interview, October 2016). I asked for clarification, and she explained that this means that “every opportunity for encouraging community and seeking help and giving help and taking care of one another is merged here.” She went on to say,

> I think [...] that if you come to school here, we will...the message is that we will do whatever we can to have you succeed, and we don’t even care if you’re going to college or...we just want you to succeed as a person, and one of the ways in which you succeed is by being respectful and caring for each other.

One parent described how much she appreciated the teachers, and how much they seemed to care about the students and families. She said to me,

> It seems like every year I fall in love with the teachers, and I’m like, “I don’t want to leave them!” And then [my son] starts a new grade, and I fall in love with those teachers. And they do such a great job, you know encouraging the kids to grow up and be responsible young adults. But at the same time there’s enough of recognizing that they’re still kids. It’s hard to find that happy medium sometimes, and I feel like they’ve done it, which is awesome. (interview, March 2018)
This parent perspective was echoed on the teacher and staff side as well. All of my interview participants who worked in the schools talked about how much they loved the students, and worked extremely hard to help them. These personal experiences contradict some of the negative assumptions that persist in parents’ social networks.

Cultivating school pride. School pride events, many of which are connected to athletics, have always been an important mechanism for the GMRSD schools to maintain a positive reputation. Local news media sources promoted TFHS teams and individual athletes, which contributed to the sense that the schools were focused on athletics. The secondary principal was aware of how important school spirit events were for community-building, and made efforts to support them and create new ones (interview, December 2016). For example, she continually highlighted community events such as pep rallies and bonfires on the schools’ Facebook pages. The superintendent regularly highlighted athletic achievements on social media, and in school committee meetings.

A new high school employee interrupted our interview at several points to talk about how impressed she was with the various school spirit activities such as “hallway wars” in which students compete for prizes by decorating the school with elaborate themes. She even scrolled through photographs on her phone to show me examples, and then asked me to walk around the school with her to look at them. She said that TFHS was “structurally very different from the last school I worked in” because they had a lot of things like this built into the schedule (interview, October 2016). Engaging community members in activities that engendered school pride helped to promote an aspect of the brand in which the GMRSD schools enjoyed a positive image.

Lack of attention to academics. In contrast to the high degree of engagement in school athletics and its associated social activities, there is a pattern of GMRSD parents not
engaging in the academic aspects of school unless there is a problem. A TFHS alumnus and parent said that her own parents had not been involved her school experience, and explained, “I wasn’t a problem child, so I just kinda coasted” (interview, April 2018). In contrast, she said her parents were highly engaged in school athletics and student performances. She described her daughter as a “straight-A student,” and “not a problem,” and said she rarely attended parent conferences or open house events, but went to all of her daughter’s games and music concerts. Organizational leaders who had worked in other public schools said to me that, in their experience, parents were much more attentive to academics in other districts than they were in the GMRSD.

I discussed parent attention to academics with the secondary principal. She told me that she had “two parents” who discussed school-level curriculum and instruction with her, and that other parents were either non-communicative on this topic, or addressed issues that were directly related to their students’ grades if they perceived a problem (e.g., a student would not be able to participate in athletics due to poor grades). She said, I guess compared to other schools where I’ve worked, there’s probably more of an assumption that, like, that’s something that the school should take care of, and there’s less of a sense that…it’s a little bit more like, “We’ll leave it to the experts.” (interview, April 2018)

I asked what parents did talk to her about and she said, “I get complaints about the athletics facilities…like are we taking good care of the fields? [...] And this is not unique to us by any stretch, but engaging parents and caregivers in a conversation about teaching and learning is really hard” (interview, April 2018). I also noticed a pattern of stakeholders focusing on athletics facilities in my observations and in artifact reviews (e.g., multiple complaints about how the concessions stand needed renovation, and perceived skimping on field maintenance), as well as a lack of attention to academic performance and programs.
Interview participants indicated that some parents were disengaged for personal reasons related to negative associations with the schools. For example, the secondary principal said that she perceived that some parents self-selected out of engaging with the schools because they had had negative experiences as students, and “maybe dropped out, and now they don’t want to come in the building or engage because of that.” A teacher who had lived in Montague on and off over the years told me that she knew a lot of parents who had attended the schools when they were young and had bad experiences, and they chose not to engage at all by choiceing their children into other schools, or homeschooling (interview, October 2016). These perceptions align with some alumni comments on surveys of parents who left the district that the superintendent conducted in 2014 and 2017.

Some GMRSD parents who responded to the 2017 survey perceived that others did not share their values about education. A parent who choiceed out expressed social discrimination and bullying against students who value academics by saying,

In our child’s experience in the gmrsd, the student culture seemed hostile to non-conformity. In this case, conformity would have required that our child embrace disdain for academic excellence and achievement in the classroom, and a total lack of civility among peers. Although the teacher and principal attempted to address the toxic student culture, we withdrew our child when the hostility turned physical. (parent survey, 2017)

Based on this set of survey responses, this perception depended upon the diversity of the school population in which students were enrolled. In the most homogeneous school, Gill ES, no parent indicated that other families did not share their values about education (this was a specific question on the survey). In contrast, the most racially, linguistically, and socioeconomically diverse school, Sheffield ES, had almost seventeen percent of parents express disagreement with other families’ values about education. To test assumptions about how families value education, I consulted responses to the parallel student survey question that year: “My family thinks it’s important to do well in school.” All schools have
agree/strongly agree response rates of over ninety percent, which could indicate that parents have different perceptions than their children, or those who perceive a disconnect were overrepresented in the survey responses.

Intentional image development. One of the school committee’s three goals in 2016-17 was to “Partner with our families and communities in collaborative student support to provide all learners with a foundation for success.” Strategic initiatives were focused on “educat[ing] the community about the district's strengths and successes,” which indicates promotional efforts, increasing parental involvement in their children’s learning and in the schools, and addressing family flight due to school choice. School and district websites are the public face of the schools, and are curated to portray certain messages (although most is designed in-house by administrators, and not by marketing professionals).

The overall content of the GMRSD websites reads as an advertisement for a rural New England lifestyle that is within close distance of urban centers (where there are jobs). Otherwise, it reflects the superintendent’s and administrative team’s priorities around progressive pedagogy, the importance of relationships, and transparency with regard to information. School websites emphasize community, a sense of belonging and engagement, and safe and supportive environments. They also highlight strategies to build meaningful knowledge and engage in critical thinking. Featuring students of color in some of the photographs is perhaps intended to convey the student body’s racial diversity. I provide details about the district’s and each school’s website below to show how organizational leaders were attempting to shape their image in the community.

District. The GMRSD website provides an overview of what the district has to offer. On the “About Us” and “Choose Us” pages, it refers to the district’s vision and mission statements by emphasizing “continuous learning, active citizenship, and personal
fulfillment” in a “safe atmosphere” characterized by “strong leadership, excellent teaching, and community engagement.” These reflect language that is contained in the district’s strategic plan, and that is often used by the superintendent. The “Choose Us” page begins with a description of the geographic area, including proximity to the Five Colleges, Springfield, and Boston. It describes the location as “the gateway to the Mohawk Trail,” which is known for the scenic beauty of the Berkshires.

It highlights popular conceptualizations of well-rounded educational programs: challenging academics, highly qualified teachers, small class sizes, personalized learning, a full range of support services, an emphasis on college and career readiness, athletics and fine arts. This content is embedded in a layout design with a teal color scheme and a background image of a meadow surrounded by trees. Banner photographs across the top of each page include photographs of the district’s buildings, stock photographs of racially diverse student groups and classroom scenes, and stock graphics of “school” images (e.g., apples, desks, pencils, books, math formulas, graduation caps, etc.). Past this initial interface, the website serves as an archive of a vast amount of online information such as school committee documents, staff lists, superintendent reports and communications, job postings, forms, and policies. There are links to all of the other schools’ websites.

**Hillcrest Elementary School.** In the first sentence on its “About Us” website page, Hillcrest ES (grades PK-1, Montague) identifies itself as a “Title I school,” which is a federal program that supports public schools with high percentages of economically disadvantaged students. In comparison, Sheffield ES (also a Title I school) does not mention this on its website. The rest of the page emphasizes fun, learning, and belonging (e.g., “every day is fun and exciting. Just take a walk through our corridors, and listen to the happy learning going on. As you do, you’ll know your child is in the right place!”). Short program descriptions of
preschool, kindergarten, and grade 1 mention teacher qualifications and alignment with state curriculum frameworks, and identifies a Responsive Classroom approach founded on the idea that “The social curriculum is as important as the academic curriculum.”

**Sheffield Elementary School.** Sheffield ES (grades 2-6, Montague) is presented as a fun place to go to school where community involvement is front and center. The school’s mascot/logo is the “Pride” with a lion symbol, and “Sheffield Pride” is a common refrain. School safety and home-school communication are featured on the “About Us” section of the school’s website, and academics are described in vague terms that are familiar to educators, but not the general population (e.g., “child-centered instruction,” “continuous assessment”). The school’s vision mirrors the priority placed on safety and relationships: “We envision Sheffield Elementary School as a learning community built on collaboration, compassion and consistency; a school environment that is safe, supportive and challenging; a school where family involvement and social responsibility are essential to academic success.”

**Gill Elementary School.** The Gill ES (grades K-6, Gill) identifies itself as a “Level 1” school up front on its website, and offers a link to its DESE report card. The “About Us” page lists offerings that start with “21st century IT classrooms with laptops and iPad carts,” and “comprehensive special education programs,” as well as extracurricular offerings that include Destination Imagination (team-based problem-solving focused on solving open-ended academic challenges organized globally by a U.S. organization), theater, and Mad Science (hands-on science activities provided by a company based in Canada). Photographs show students engaged in outdoor and project-based activities.

**Great Falls Middle School.** The GFMS (grades 6-8, Gill, Montague, Erving) website uses the word “small” three times in the first two sentences on its “About Us” page, and then mentions “personalized attention.” It describes its strong athletics program that
includes golf, ice hockey, football, and swimming. This intro page also outlines a focus on personal responsibility for one’s behavior in support of a respectful community, and describes the middle school model designed to bridge elementary and high school structures in support of the unique needs of young adolescents. On the “Why Choose Us?” page, the text highlights “a positive, safe, and supportive learning environment for all” through approaches based on Responsive Classroom, Positive Behavior Interventions and Supports (PBIS), and Developmental Designs that focus on internalizing school-wide expectations.

*Turners Falls High School.* TFHS (grades 9-12, Gill, Montague, Erving) shares a building, and administrative staff with GFMS, yet the content of the two schools’ websites show distinct differences. Like GFMS, the “About Us” page on the high school’s website emphasizes its “small-town feel” in the opening sentences. The linked “Our School” page then emphasizes academics. It refers to student performance on state achievement tests, high expectations, student leadership, and highly qualified faculty and staff members. It lists and describes three guiding principles: lifetime learning, responsible citizenship, and academic success. The lack of reference to athletics on this page is interesting, as this is what the school is known for in the region.

The “Athletics” page keeps the academic theme going with introductory sentences that refer to “student athletes,” and the statement, “We hold our athletes to the same academic and behavioral expectations as the rest of our student population.” It provides basic information about what sports teams are offered, how to join, and links to forms, guidelines, and game calendars, but does not feature team or game photographs. The “Clubs” page also grounds extracurricular activities in educational rhetoric by stating “Research shows that teens involved in extracurricular activities do better in school, develop better social skills, and have broader views of the world.” Clubs listed include art, band,
chorus, dance, musical, cooking, gay-straight alliance, National Honor Society, and student council.

**Responsibility to Serve All Students**

Partly due to the rapidly diversifying student population, there was a growing sense in the GMRSD system that it is the district’s responsibility to serve all students. As a public school district, they are responsible to educate all students no matter their race, gender, socioeconomic level, (dis)ability, or English learner status. This growing awareness was not necessarily related to a lack of concern for student needs, but more related to the relative homogeneity of the student population in the past.

Current norms in public education are focused on the rhetoric of inclusion, diversity, and access for all. This has been embedded in federal public education law since the adoption of the Elementary and Secondary Education Act of 1965 (ESEA), and its most recent reauthorizations, the No Child Left Behind Act of 2001 (NCLB), and the Every Student Succeeds Act (ESSA) of 2015. The rhetoric of this law and its updated versions is focused on equal access to education for all students, with special attention paid to race, class, disability status, and English learner status.

Education reforms beginning in the 1980s and 1990s focused not only on equal access, but on equal outcomes. The underlying reasons why some groups of students perform better than others in school are complex, and inextricably tangled with wider societal issues such as economic inequality and structural racism, but the point is that there is an institutional norm of equity in public education that GMRSD leaders were beginning to appreciate first-hand under the guidance of the superintendent, and through their experiences supporting a more diverse student body. In addition, regulations are in place that hold schools accountable for all students’ academic achievement and attainment with special
attention paid to disproportionalities between populations based on race, income, (dis)ability, and English learner status.

GMRSD organizational leaders recognized this responsibility. In 2014, the superintendent and school committee created a document called “Building Bridges to Success” that included the organization’s vision (“A community that empowers every student for continuous learning, active citizenship, and personal fulfillment”), mission (“Challenging and supporting every student to succeed through strong leadership, community engagement, and excellent teaching”), and core values (persistence, integrity, empathy, and continuous learning). This document also outlined core beliefs that reference high expectations for all students’ learning, the importance of “21st century skills” (critical thinking, problem-solving, effective communications, collaboration), authentic and meaningful learning, holistic student development (academic, physical, social, emotional), safe and supportive learning environments, adult learning, home-school partnerships, and school as a place to cultivate democracy and achieve social justice. Frequent references to “all students” and “every student,” plus the invocation of “social justice” as a core belief (e.g., in the 2014-17 GMRSD strategic plan) indicates that GMRSD leaders are committed to supporting all students to succeed no matter their level of need.

Organizational leaders purposefully embedded these values and beliefs in their work, especially with regard to students who were disadvantaged or struggling to learn in some way. For example, one of the superintendent’s goals in 2016-17 was to “Increase understanding of how to promote a multicultural, social justice, and active citizenship perspective in the teaching, learning, and work of the district.” Notes on the school committee’s discussion of this goal state,

The school committee and administrative team share the goal of enhancing student learning from a multicultural, social justice and active citizenship perspective. We
aspire to not just improve student learning in these areas but to improve as schools and a district that welcomes and supports students and families with diverse backgrounds and experiences. (SC meeting minutes, September 2016)

The secondary principal mentioned to me,

I said to my faculty just last week and the week before, “You know we’re a majority, almost entirely white staff of an increasingly racially, ethnically, linguistically diverse student population, so we…attending to social justice education is not an option for us. It’s a have to.” (interview, April 2018)

This comment occurred in the context of a conversation about the administrative team’s commitment to equity as a guiding philosophy in their work. Across the organization, GMRSD leaders recognized that their primary responsibility is to strive to ensure equitable achievement and attainment for every student.

**Ineffective Academic Programs**

The GMRSD has problematic aspects of its academic programs. It was designated by DESE as a low performing district from 2007 through 2014 based on student test scores and graduation rates, and was required to implement improvement plans that were overseen by the state. In 2016-17, it was designated “Level 3,” which meant it had autonomy with regard to improvement planning and implementation, but was at risk for dropping back into the zone of state control. At 2016-17 school committee meetings, the superintendent announced that student test scores in the prior year had not met benchmarks, and graduation rates had dropped.

In his entry report from 2014, the superintendent had outlined four issues that formed the core of the state-mandated Accelerated Improvement Plan that was in effect from 2011-2014: disconnect between district curriculum and state standards, lack of data analysis, teacher evaluation not promoting effectiveness, and inadequate professional development. He summed up teaching challenges as:
Despite noble efforts, GMRSD lacks the collaboration time, coaches, and professional development funds to support multiple improvement initiatives that require teachers and staff to develop new and often complex teaching techniques, ancillary skills, and, at times, paradigm shifts in how they see their work.
(superintendent entry report, February 2014)

In the report, he cites overall frustration about a lack of time and resources for educator professional development, and the sheer volume of objectives and initiatives outlined in the AIP. He also cites as an overall theme that frequent leader turnover had resulted in lack of trust between teachers/staff members and administrators. Some parents use these official labels and test scores as a proxy for school quality, but wealthier and/or white parents interpret progressive teaching and learning methods as evidence of school quality (Schneider, Marschall, Teske, & Roch, 1998). Based on the superintendent’s report, he is seeking to meet state requirements (and improve ratings), yet is doing so with a more progressive approach.

Since that time, the district had developed the “Building Bridges to Success” guiding document that outlined clear learning principles that were intended to guide teaching and learning efforts. These principles state that knowledge is constructed by building on prior knowledge through application of concepts and skills in safe and supportive social contexts, learning needs to be individualized for each student, and learners need to see purpose and value in the process, be engaged, and have clear goals and feedback. They reflect the superintendent’s personal philosophy of education as described earlier, and also reference paradigm shifts that he deemed necessary for improvement.

The district had been following a strategic plan that had objectives related to improving student literacy (especially at the elementary level), addressing student behavior issues that prevented learning, increasing opportunities for students to engage in higher order thinking and critical analysis (especially at the secondary level), improving teacher and administrator skills and knowledge in these areas, and providing structured time for
educators to collaborate and discuss students’ academic progress. They had made progress over the past few years. Organizational leaders were aware that meeting these objectives was essential if the GMRSD hoped to avoid state sanctions for low academic performance.

In addition to needing to improve its academic program in order to maintain autonomy over its teaching and learning work, the GMRSD also needed to do so to retain families. Several data sources provided evidence that perceptions of poor academic programs were influencing parents’ school enrollment decisions. Results from a 2014 parent survey that the district conducted show that approximately one-third of respondents cited quality of instruction (35.2%), student-teacher relationships (31.8%), and level of academic challenge (29.5%) as “strong” factors in their decisions to leave the district. For example, a parent said on the 2014 survey that the “state rating was a large factor.” Several other comments on this survey specifically cite MCAS scores as a reason parents chose to leave.

Interestingly, not one comment on a similar 2017 parent survey directly referenced a state accountability metric such as MCAS scores or graduation rates, although these were implied in some comments. For example, a current Hillcrest ES parent indicated on the 2017 survey that they were choosing out the following year because, “The district as a whole consistently underperforms compared to surrounding schools.” Other comments referenced poor graduation and college attendance rates, lack of academic challenge, lack of individualized student attention and differentiation, inadequate support for students’ disabilities, and a focus on test preparation in the curriculum.

An overarching theme in survey responses in both 2014 and 2017 was that the GMRSD schools did not meet students’ learning needs. This included claims that classes were not academically challenging, students’ special education needs were not being met, a lack of quality arts and music programs, a lack of hands-on curriculum and outdoor
programs, few elective offerings at the high school level, and a general sense that students were not seen (e.g., “If the child is not a genius or a trouble maker no attention is paid to them”). Several parents also claimed their children were bored. Rapid leader turnover had resulted in over a decade of stagnation in the GMRSD in terms of updating teachers’ instructional practice. Under prior organizational leaders, one “quick fix” solution to their accountability problems had been to adopt a test preparation approach to curriculum and instruction. One parent commented on the survey,

I am concerned about the continuing standardized assessments and the requirement to teach to the test. I find my child often bored, waiting for her peers to catch up to her. I would like more diversification of teaching at the higher levels in the classroom. (parent survey response, 2017)

Some of my interview participants indicated that this type of teaching was common among some veteran teachers. Their perception was that it was not engaging for students, nor was it effective. A TFHS teacher said to me that there were people who had worked at the school for over 20 years who were “stuck in their ways” and generally pretended to go along with administrative initiatives because they had had so many district and school leaders over the years, but did not change their practice (interview, October 2016). She said, “They’re like, ‘Oh, here comes another one,’” and claimed that they have an “old school” mindset, and use a lecture-heavy approach to teaching. She said that many of these teachers perceive extreme pressure to have students perform well on MCAS, and cite this as the reason for not using cooperative, hands-on practices. She added that there are also a lot of invested teachers who do innovative work. This idea that teacher approaches and skill sets were inconsistent was a general theme in the data.

The idea behind state quality ratings is that schools will improve them in order to improve their reputations among potential families. Several interview participants who worked in the schools were noticeably frustrated by the lack of information people in the
community seemed to have regarding positive aspects about the academic program. For example, a teacher cited the secondary school’s video production program and its teacher, who was a well-known artist in the community, and lamented the fact that this type of program was not highlighted on the district’s websites or in the media (interview, October 2016). In separate conversations I had with the superintendent and secondary principal, they both confirmed a pattern I had noticed on the district’s and secondary schools’ Facebook pages in which posts about innovative teaching and learning activities (e.g., hands-on science experiments) did not generate any participant activity unless individual students were featured or pictured, and then the comments and reactions (e.g., “likes”) were directed at the students, but did not reference the activity or learning (interviews, March 2018).

For example, the principal said, “I try to put things on our Facebook page, like ‘Look at these girls soldering something in the Maker Lab!’” but she was disappointed when these photos were not recognized (interview, March 2018). As another example, teams of teachers had worked hard to create detailed curriculum maps for all of the core disciplines, and the superintendent posted them for community review and feedback on the district’s website. When I asked him about this, he said he had received “zero feedback” and was not convinced anyone had looked at them (interview, March 2018). Administrators were making efforts to show the community that things were changing for the better with regard to academic, but durable narratives about its inadequacies remained. Perhaps this is not surprising considering the pattern of stakeholder focus on athletics and school pride activities over academics.

**Disruptive Student Behavior**

Despite positive associations with athletics, the GMRSD schools were widely perceived to have many disruptive students and bullying. Sometimes these reputations were
founded on or amplified by rumors as opposed to personal experiences. One parent who had choiced out commented on a survey, “There are rumors going around from teachers that some ‘crazy’ stuff happens. I’m a teacher in Greenfield and have heard this from former teachers of your district” (parent surveys, 2017). An interview participant who had lived in Montague while her child was young told me that she knows a lot of families that moved into another district right when their oldest child was entering kindergarten. I asked what influenced these decisions, and she said that the GMRSD’s “reputation precedes it” (interview, October 2016). She said that some of these parents went to GMRSD schools themselves, and had a bad experience (e.g., seeing a teacher drinking out of a flask at school), and then these personal experiences were transmitted through parent networks. She said, “nothing I ever heard about this district was good.” She had enrolled her child in another school without even investigating her home option. A TFHS teacher who had lived in Montague told me that “social interaction” was a typical thing that parents referenced when they sought to remove their children from GMRSD schools because they did not want them to be constantly exposed to “witnessing kids who aren’t behaviorally stable” (interview, October 2016).

**Student behavior is a noticeable problem.** Stakeholders perceived persistent problems with disruptive student behavior in the schools. For example, Tammy (the localist described earlier) pressed the school committee at a meeting to hire a school resource officer, claiming that it would reduce the bullying that was driving students away (SC meeting minutes, June 2017). In the same month, two representatives from an organization called Franklin County Against Bullying also told the school committee that bullying was a major reason students left the schools (SC meeting minutes, June 2017). I spoke with a 1994 TFHS graduate and parent of a high school student who claimed that “there’s a lot more
families that [...] just send their kids off, and don’t deal with them, they don’t parent them, they don’t say, ‘no you can’t do that” (interview, April 2018). She said she had formed these impressions from interacting with her daughter, and her daughter’s friends and family members. The public nature of her job also put her in conversational contact with many GMRSD parents and staff members on a daily basis, and she said that some of her impressions came from that as well. She said that she had heard a lot of stories from her daughter about students who drank alcohol and took illegal drugs during school. While this parent did not perceive student behavior and bullying as a problem for her own family, she confirmed that it was noticeable in the schools.

Disruptive student behavior affected how all students engaged in school. A high school teacher confirmed that there were a lot of student behavior problems in classes, and she said that this resulted in students who were “interested in learning” sequestering themselves in advanced level courses, even if they were not prepared to handle the content (interview, October 2016). A parent I interviewed spoke extensively about unaddressed bullying involving his son despite several conversations with the school principal at the time. These incidents and ineffective administrative response had finally overcome their loyalty to the schools and resulted in them finding another school option for him through interdistrict choice (interview, November 2016). This type of story was repeated throughout my data.

Specific concerns surfaced in the GMRSD’s June 2017 parent survey. Of respondents, almost thirty percent of Sheffield ES parents, a third of GFMS parents, and 40 percent of TFHS parents thought that there were unhealthy cliques based on race, ethnicity, or class. Almost half of TFHS parents, and a third of Sheffield ES parents agreed or strongly agreed that student bullying was a problem. These responses show trends that perceptions of cliques and bullying increase as students get older, as well as differences between Sheffield
and Gill elementary schools (i.e., no parent from Gill ES parents perceived unhealthy cliques, and their perceptions of bullying were one-fifth that of Sheffield ES parents). These results contradict interview statements that all students get along, and that there is a strong community. Narrative responses to the 2017 parent survey illustrate the extent to which bullying, poor student relationships, negative school climate, and ineffective discipline systems and adult responses to these issues were affecting their children.

Bullying—especially unaddressed bullying—was prevalent in parent comments on the 2017 survey. Some typical examples include:

My child had another student that was picking on her, giving her problems all year. This problem was not resolved even after meeting with the principal 4-5 times. (current Hillcrest ES parent, 2017)

We had issue that always were put off by staff here were multiple calls and issue, over 20 time the only time it was resolved was when the police had to be involved. There was a zero tolerance policy that never seemed to be enforced. (current Sheffield ES parent, 2017)

Unresolved bullying incidents despite repeated attempts of parent contact w/ Administration & Vice-Principal. Very Frustrating! My daughter has done her part by informing teachers/admin of the incidents and we as parents have spoken to school on several occasions with specifics. Still the bully remains at school w/o change in behavior. (current GFMS parent, 2017)

Our son was bullied and physically abused as a 6th grader. His situation was well documented, all the way to meeting the then Superintendent. Nothing was done and the bullying ended with our son defending himself the next time he was bullied. This made it very easy to seek education elsewhere. (parent of student who choiced out, 2017)

A corresponding student survey was conducted in grades three through six that year. Almost thirty percent of students disagreed or strongly disagreed that students at school treat each other with respect at GFMS (29.5%), over a quarter at TFHS (25.4%), and almost one-fifth at Sheffield ES (19.7%) compared to 13 percent of Gill ES students. These survey results show that student behavior was widely perceived as a problem by parents and students alike.
A few survey respondents made it clear that there was nothing the GMRSD could do to change what they saw as a hopeless situation. For example, one narrative response read,

I'm not sure if it's possible [to improve]. Schools are faced with the challenge of properly educating and at the same time managing a population of children who a great percentage of which have had no parenting or discipline at home. This mixed with a generation raised on social media is an uphill battle. Unfortunately it has changed the school environment from a feeling of community and closeness to one that seems to run damage control. The kids that enjoy learning and behave have freedoms and privileges revoked so they are held back from their full potential. (parent survey, 2017)

Even parents with long histories in the district expressed negative impressions of the school environment. One parent who had chose out wrote, “I am an alum of GMRSD, however I find the current culture to be counterproductive to fostering a positive learning experience.” Another said,

I attended the schools in town from k-12 and I don't believe they are what is best for my children, and they have gotten worse since my graduation in 1996. From bullying by peers, to ineffective staff being left in place indefinitely, to the ridiculous rules enforced by teachers, I have no interest in sending my children anywhere within this school district. (parent survey, 2017)

These responses make it clear that student behavior was affecting families’ school enrollment decisions, and contributing to stakeholder disengagement.

**Discriminatory school environments.** Some parents expressed perceptions on the 2017 survey that the schools were discriminatory. For example, a GFMS parent said, “My son deals with homophobia frequently & aside from social stress it has made him feel unsafe.” Another with multiple students in the GMRSD schools said, “My grandson loves pink. He was made to feel unwelcome and embarrassed by the Gym teacher for wearing pink sneakers.” A current parent at multiple schools commented on the 2017 survey, “Great Falls and Turners Falls High school there is a lot of racism.” Multiple school staff members explained to me that students for the most part got along well, and were accepting of diverse peers. One said, “This place is too small to have major cliques. Kids get along. It’s a safe
school to be somewhere on the gender identity spectrum. It’s safe to be gay” (interview, October 2016). The person paused for a bit, and then added, “I would say it’s probably not the best place for a young black man who’s not overly athletic or has some other typical school status aspect that would help him to fit in.” A TFHS parent said that her daughter’s friends were accepting of LGBTQ students (interview, April 2018). All of this points to a general sense that there are mixed perceptions of school culture with regard to the increasing diversity of the student body.

**District responses to student behavior.** The 2014-17 district strategic plan included an objective titled “Readiness to Learn” that sought to “provide social and emotional supports required to ensure all students can fully engage in learning.” Initiatives under this objective were focused on student behavior and social and emotional development⁹. This included building teacher and staff member skills in how to meet students’ social and emotional needs, classroom management, and creating environments that are conducive to student learning. In other words, the “readiness” aspect applies to the environment as well as individual students.

One initiative was to develop systems of behavior support for the types of high-needs students referenced earlier. In his entry report, the superintendent referenced existing programs that continued to be implemented in 2016-17 (superintendent’s entry report, February 2014). These include *Tools of the Mind* in PK/K, *Responsive Classroom* in grades 1-5, *Developmental Designs* in grades 6-8, and student-led advisories in grades 9-12. In addition, a *Restorative Justice* approach, and use of restorative practices had been occurring at the

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⁹ According to the Collaborative for Academic, Social, and Emotional Learning (CASEL), a leading organization in the field, “Social and emotional learning (SEL) is the process through which children and adults acquire and effectively apply the knowledge, attitudes, and skills necessary to understand and manage emotions, set and achieve positive goals, feel and show empathy for others, establish and maintain positive relationships, and make responsible decisions” ([https://casel.org/what-is-sel/](https://casel.org/what-is-sel/)). SEL is increasingly a focus in public education, and was recently embedded in the federal Every Student Succeeds Act (ESSA).
secondary level since 2013 through the work of The Partnership. These programs were all intended to help students to become more self-aware, and to build positive and productive relationships among peers and between adults and students.

Restorative practices represent a relational approach to discipline and student development, in contrast to more traditional punitive approaches. Partnership staff also work with school counselors and teachers in the secondary schools on a student-led advisory program, and a peer mediation program. Tools of the Mind is an early childhood approach based on the work of Vygotsky, a child psychologist “who believed that just as physical tools extend our physical abilities, mental tools extend our mental abilities, enabling us to solve problems and create solutions in the modern world” (https://toolsofthemind.org/about/history/). The approach focuses on teaching children cognitive skills related to self-management and social engagement. Responsive Classroom is an “approach to teaching that focuses on engaging academics, positive community, effective management, and developmental awareness” (https://www.responsiveclassroom.org/about/). This is a nationally-recognized and utilized approach that was developed and is managed by an organization called Center for Responsive Schools located in Turners Falls. Developmental Designs is founded on principles that state that teachers knowing and supporting students’ social, emotional, and intellectual needs is as important as content expertise. In light of the problematic aspects of student behavior and school climates, organizational leaders viewed these programs as essential to student and school support, and they had been in place for several years prior to 2016-17.

Patterns of Family Mobility and School Choice

When the superintendent started in mid-2013, he recognized the problem of “family flight” in his entry report, and suggested finding out about the root causes. The school
committee chair during the 2016-17 school year had been a member since the early 2000s.

He suggested that they had come to a slow realization of the effects of school choice policies. He said to me,

School choice wasn’t a feature here ‘til maybe 15 years ago, and for the first coupla years it was, “Oh! There’s school choice? Really? What does that mean? I’m not sure. They do it in Worcester. And now they have it here. Oh, that’s interesting.” That may be oversimplifying, but… (interview, November 2016)

He went on to describe how they rationalized this change:

…you know, a couple kids we’d lose ‘cause their parents were working in Deerfield and it was easier to pick them up and drop them off, and day care and whatever else. Mostly for convenience. And there were a lot of families…well, I don’t know about a lot, but there were families…there was a core, solid core of families who weren’t gonna send their children to the district. They live in the district, but never intended to send their kids here, and they can send them to the private schools. [...] and there weren’t charter schools to speak of then either, so it was a novelty and sort of an oddity…a curiosity. [...] And then we started losing students.

In these statements, the chair articulates two reasons why organizational leaders assumed families would leave: convenience, and some families automatically send their children to private schools. It appears that competition from private schools was not something they paid attention to, perhaps due to a sense of futility—these parents, so they assumed, would never attend GMRSD schools anyway. He said later in the conversation, “[W]e need to be real careful about not going after 10% who leave, ‘cause there’s 10% who are just gonna leave.” Ascribing family decisions to convenience is another way to externalize the reasoning behind that choice. However, the district he mentioned, Deerfield, has traditionally had a significantly lower percentage of students from low-income families (e.g., in 2000 Deerfield had 12 percent versus 32 percent in the GMRSD), which could imply that families are looking for schools with more advantaged populations. Earlier, I identified similar patterns that occurred after the Montague Center School closed. The literature on race- and class-based school choice decisions is heavily focused on urban areas, and also on
race as a deciding factor, not class, but several studies have shown that parents tend to choose whiter schools (e.g., Billingham & Hunt, 2016; Holme & Richards, 2009; Rabovsky, 2011; Saporito, 2003; Welsch, Statz, & Skidmore, 2010). Class could be a deciding factor for these parents based on perceived advantage, but it is not possible to know for sure.

Push and pull reasons for leaving. The current superintendent attempted to uncover root causes behind their student loss. To this end, he surveyed parents who had enrolled their students in other district’s schools, charter schools, private schools, and/or homeschooling in March 2014. He also followed up on these surveys with personal telephone calls to many families (one of my interview participants confirmed that she had spoken with him in this capacity). The reasons parents gave for leaving varied, but he said there were patterns that centered around academic programs, disruptive student behavior, community engagement, and patterns of family mobility and disconnect that lead them to leave the district (interview, December 2016).

A parent explained to me that he was dedicated to supporting their local schools in the GMRSD, and one of his children had been successful there; however, he needed to find another option for his son due to a persistent unaddressed bullying problem. They tried applying to charter schools and several other traditional public school districts, and then chose one from those where he was accepted through the lottery, and where transportation was workable (interview, November 2016). This parent’s story aligns with research by Kleitz, et al. (2000) that families who have experienced unsafe schools use safety as a priority criteria in their schooling decisions, although this earlier research was done in an urban setting.

When we met in December 2016, the superintendent described to me “push” and “pull” patterns he had noticed. Families were pulled away toward schools that had specialized programs, or that they perceive to be more aligned to their pedagogic
philosophies and their children’s needs and interests (interview, December 2016). This aligns with other findings that parents are using academic programs as criteria for their schooling decisions (Bast & Walberg, 2004; Kleitz, Weiher, Tedin, & Matland, 2000). He gleaned from the 2014 survey responses that families were pushed away by disruptive student behavior, or perceptions that their children’s needs and interests were not being met. These factors are reflected in the academic and student behavior problems described above.

**Patterns of relative advantage in family flight.** The superintendent told me that he discovered what he perceived as a socioeconomic pattern related to family social networks that pulled more advantaged families away (interview, December 2016). He said, 

> [...] the biggest thing, and the hardest thing to explain carefully, I think, from the families that have left, the lowest marks we got weren’t about teachers feeling connected...or kids feeling connected to their teachers...how did I phrase it? It had to do with the...the nature of student-to-student interactions was the big...that was the biggest concern...the quality of student-to-student interactions and relationships. Which tells me a lot about what our biggest challenge is, really, and if you ask kids in the high school particularly, that’s where you’ll hear them talk about how their friends or their peers are not here. (interview, December 2016)

I asked him to explain the last part by asking, “Because their friends have gone elsewhere?” He replied, “It’s the cycle [...] it’s really kind of a socioeconomic thing that the...the families [long pause] a lot of our families are gone already, and that leads to other families...choosing to leave.”

At the time, I interpreted this comment as indicating three reasons families left the district: students felt disconnected from school, peer relationships in GMRSD schools were poor, and families with relative socioeconomic advantage left and others would follow. This supports the literature I cited earlier that supports a possible class-based element to family choices. In addition, this could be additional evidence that aligns with studies that have found that white, middle- and upper-middle-class parents deduce school quality based on assumptions about race and class composition, and location (Holme, 2002; Roda & Wells,
2013; Smrekar & Honey, 2015). Again, these studies were in urban areas, and the factors could be different in this rural/suburban setting. Other researchers have found that economically disadvantaged families are less able to overcome transportation and commute time barriers to access schools of choice, which clusters them in their local schools (André-Bechely, 2005, 2007; Hammond & Dennison, 1995; Witte & Thorne, 1996).

I looked at the 2014 survey results myself (they were posted on the district’s website), and confirmed the patterns he had shared. Aside from direct concerns about academic programs or student behavior, many parents’ comments indicated that their choices were based on non-academic reasons: family logistics, carpooling, work commutes, child care, and proximity to other schools. Many parent respondents to this survey cited school location as a reason for choosing outside the GMRSD. This could be the primary reason for the choice, or simply an explanation that avoided criticizing the district. Sample narrative responses included:

- Long bus ride
- We live on border of adjoining town and closer to other school
- Easier to where we work and to daycare
- My daughter’s current school is directly across the road where we live. It is easier to transport her from work

The literature supports the idea that a familiar environment is one criteria for choosing a school (e.g., Bell, 2009a, 2009b; Jacobs, 2011); however, these studies were conducted in urban areas, and looked at patterns of school racial segregation that mirrored residential segregation when families enrolled in schools close to their homes. In addition, some of these families had never been enrolled in GMRSD schools despite living in the towns. Narrative responses that support this idea include:

- Kept daughter with classmates after a divorce. Needed her to have that stability
My children have gone to Greenfield schools since they started school and, did not want to remove them from what they were used to.

We previously lived in the other district. My daughter had already been in Amherst and we didn't want to transition her to a new school.

In these rural/suburban cases, stability was a concern for parents who had disrupted their children’s living situation in some way, yet their school enrollment choices represented overcoming additional barriers to do so by choosing to stay in prior schools after moving residences. These responses contradict findings—most of them from urban areas—that many families prefer schools closer to their homes (Bifulco & Ladd, 2007; Kleitz, et al., 2000). These choices depend on parents being capable of navigating school application processes, and overcoming barriers such as the need to provide your own transportation.

From the superintendent’s perspective, families who could make these types of choices were relatively high on the socioeconomic ladder (interview, December 2016). A parent provided an illustration of this type of privilege related to transportation and access to choice, despite other family constraints (interview, October 2016). She lived in Turners Falls, and was part of a blended family (i.e., two or more households that share students, sometimes in different towns, as can occur after parents separate). The family had two children: one who attended an elementary school in the other parent’s town, and the other who attended the Four Rivers Charter Public School in Greenfield. She explained,

[...] what happens is that if you have more than one child, or if you have made alliances with other families, then there is considerable convenience in just having one system. So for instance, when my younger child, who’s in fifth grade, finishes at [town] Elementary after sixth grade, the chances are very likely that he will go to Four Rivers because they have the sibling priority in the lottery, and his brother...like right now we’re taking them to two different schools that have two different schedules. One school has early release every Wednesday, and one school has early release every Friday. So at our house, both parents work full time, so we both have had to organize our schedules so that we can get out early enough to pick them up from their schools because for us there’s no transportation for either of them. And if they were going to go to school here in Montague, they would have an in-service day schedule that’s more random. So about once a month there’s a day when they get out
of school early, and then every couple months there’s a whole day off, and, like last week, the fifth grader had Friday off for an in-service day, and this week the seventh grader will have Friday off for an in-service day, and then next week Four Rivers has their parent conferences and they have two early release days, and then the following week the [town elementary school] child has parent-teacher conferences. So literally we have four weeks in a row where at some point...and they’re all on Thursdays and Fridays, which are all our days. So the pull to say to the fifth grader, “Sorry if you want to go to Pioneer [Valley Regional School] with your friends, you’re going to go to Four Rivers because we know it’s a good school and it’s just gonna be a lot easier for us to be able to have you guys both be on the same schedule.” The pull is pretty strong. And we have a neighbor whose kid is already going there, so we can carpool with them. (interview, October 2016)

This family is not wealthy, nor do they have unlimited resources of time and energy. They have logistical challenges, but they also have the ability to drive these students around, have access to a parent network with whom they can arrange carpooling, and have all-but-assured admission to a popular charter school due to a state policy that gives priority lottery preference to siblings of current students. As a longtime school administrator in the area, this story felt familiar to me. Access to transportation as a segregating factor in school choice is also supported in the literature as described above.

Once one child in a family leaves, as long as they are satisfied with their school situation, and the family is able to support it logistically, it is unlikely that they will return. They also draw other students from the family’s social network with them. The parent referenced above explained to me:

So what I noticed is that we got a carpool list from Four Rivers that had all the students with all the grades and where they lived, and it was like the thing that they gave us once we got in through the lottery. So the first thing that I did was look at that list to figure out who else is coming from Montague, and what I noticed was that there are clumps. So you have three kids who all live on the same street in Leverett, you have three kids who live in the same neighborhood in Greenfield, you have three kids who I know all were part of the same homeschooling co-op, so when you have...I think often there’s a family that maybe has a child who’s one or two years older, and they go out and they kinda figure out, “OK, this is good,” and then they tell their friends, and often I think you see this effect where you have a cone that follows after one particular child. (interview, October 2016)
This is a high-level anecdote told by one person, but it illustrates the power of parent and family networks in terms of students’ school choices. It aligns with studies that have shown that ground-level information about schools, admissions procedures, and the like flows through social networks that are stratified based on race and class (André-Bechely, 2005; Ball & Vincent, 1998; Holme, 2002; Roberts & Lakes, 2016; Schneider, et al., 1997). It also confirms the complexity of families’ school choices. The children in this woman’s family live in two homes in different towns. She had explained that the older one applied to Four Rivers because it is small (just over 200 students in grades 7-12), and he is shy and would have been “lost” in his larger regional middle school (not GMRSD). Luckily, he got in, but if he had not, they have the social, economic, and educational capital to support him in his local school. If things had not worked out, they probably could have figured out another option, perhaps through interdistrict school choice to some other school.

Aside from some of the GMRSD schools, all of the schools in the area are rated “Level 1” and “Level 2,” therefore, all of them provide an adequate basic education according to state metrics. The younger child in the first scenario was currently attending his local elementary school in one of his home towns, and was being told he would attend the charter school to ease family logistics. No one mentioned state tests or school performance. The older child in the second scenario had an issue that needed to be resolved, from the parents’ perspective, by enrolling in a small school. These parents were looking for school communities where their children would be safe and seen. They are educated professionals who are highly mobile and have social networks that span the entire area, and they can draw on them when necessary. This also confirms research that shows that parent social networks can be biased based on race and class (Phillippo & Griffin, 2016; Schneider, Teske, Roch, & Marschall, 1997; Villavicencio, 2013). All of this confirms the superintendent’s perception.
that groups of families with the means to do so are following each other into schools of choice, but illustrates that the reasons behind their choices are highly complex.

**Transportation barriers concentrate need.** There was a widely-held perception among GMRSD stakeholders that the types of logistical challenges that these highly-mobile families were able to overcome presented barriers to choice that were resulting in concentrated student need in the GMRSD schools. For example, the superintendent told me,

> [...] there’s a bit of a class element I think that’s worse here [in western MA] than there [eastern MA] because you, if you go to a neighboring town’s charter school, you have to provide your own transportation, and we have a hard time getting families to just get their kids to Hillcrest and Sheffield, and they live less than a mile away. A lot of people don’t own cars. A lot of people work shifts that wouldn’t allow them to drive their kids a few miles to a charter, so…a charter is out of reach for some of those families just before you even get out of the starting blocks. (interview, December 2016)

In the case of the GMRSD, it could be that as students with greater levels of need become more concentrated in GMRSD schools due to choice barriers such as lack of transportation, comparatively advantaged parents increasingly avoid the schools and are able to overcome the transportation barrier. A parent interview participant explained this perceived pattern when she said,

> [...] this produces quite a divide for families. There’s a whole different socioeconomic level for kids when they need to have a means to get them [to schools of choice]. This is my own totally biased opinion, but a lot of low socioeconomic status goes hand-in-hand with behavior issues, and privileged people have a car—I put them in the privileged category [if they have a car]—and this creates schools that are not accessible to unprivileged families. (interview, November 2016)

Transportation barriers are likely preventing some economically disadvantaged students from accessing school options that do not provide it. This was a barrier that surfaced in the literature (e.g., André-Bechely, 2005, 2007). However, in this statement, she is connecting
disruptive student behavior and low SES. Others mentioned this as well, usually in the context of talking about students with trauma histories.

There are most likely many situations in which these two things are connected, although I also heard stories about students who were in neglectful home situations and were participating successfully in school. For example, a staff member told me about an eighth grade girl who lived with her dad and was at risk of being put into foster care due to his drug addiction: “She plays three instruments, is going to do basketball or swimming, rides her bike for two hours every day, and does her homework mostly at school. She’s pretty self-sufficient, and in fact more than resilient, talented! [...] She totally takes care of herself” (interview, October 2016). This person confirmed that students in this type of situation would be unlikely to be able to access any choice option that required transportation, but she did not assume they all had behavioral problems.

Between the “churn” described by the superintendent, and the fact that many of these students were not in situations in which they could obtain transportation to a school of choice, or even apply in the first place, the general perception among GMRSD leaders and staff members was that the percentage of high-needs students was increasing as a direct result of school choice policies. Even if this were not the case, I provided evidence earlier that disruptive student behavior—whatever the source—was negatively affecting parents’ perceptions of the schools, and this may be resulting in family flight for those who can overcome barriers to choice.

There was another perceived socioeconomic pattern that led to more privileged families leaving GMRSD schools that surfaced in my interviews, as well as in parent surveys that the district conducted in 2014 and 2017. Until recently, the GMRSD did not have full-day pre-kindergarten programs, or effective after-school care programs in the younger
grades, and this resulted in working parents seeking other school options that offered access to child care. Parent survey comments included: “When [child] was in first grade, no afterschool was offered at Hillcrest,” and “No afterschool program at the school.” Once these families had established themselves in preschools outside the district, they developed social networks away from GMRSD schools, which led them to choose other school options.

One of my interview participants told me that she had inadvertently left the district for this reason (interview, October 2016). She enrolled her daughters in a preschool near her work in Greenfield for convenience. Her daughters made friends and thrived. She loved the people who ran the program, as well as the diversity of families who went there. The preschool also had an after-school program, vacation camps, and summer camps for older students, and offered transportation from the elementary schools in Greenfield, which accommodated their needs as the children grew. Enrolling in Greenfield schools through interdistrict choice allowed her children to maintain the friendships they had developed. As they got older, they could walk from school to her office, and she felt they were safe. This parent told me that there was no particular reason for leaving the GMRSD schools, and that she had nothing against them, but that a series of interlocking family decisions had led them to their current situation. A school committee member who was part of the Friends of Hillcrest parent group also told me that they were aware of this pattern, and said they were creating events to invite families to the school and to make sure they were meeting a wide range of needs (interview, November 2016).

This child care pattern seems benign, and the GMRSD had since added more child care options that support working parents, which improved the situation; however, another parent explained that she knows many families who avoid Hillcrest because a large
percentage of the preschool slots are reserved for children who are involved in government-sponsored social service programs such as Head Start, and/or have early-diagnosed disabilities and are legally guaranteed special education intervention services (interview, October 2016). This concentrates high-needs students in the Hillcrest preschool, and all of these students transition to kindergarten where they are joined by the rest of the students who have been in private daycare settings or stayed home with a parent. This parent explained, “So [the new kindergarten students are] either coming from really high functioning families, or they’re really in trouble because they’ve been totally off the radar.” She went on to explain a typical scenario for parents who are in her (relatively privileged) social group:


The Gill ES does not have this pattern, as they do not run a preschool program. This parent said that many Montague families enroll their children in Gill ES through intradistrict school choice in order to avoid the high-needs students at Hillcrest. This supports the idea that families who can overcome choice barriers are seeking schools that have fewer students with disabilities, and fewer students from low-income families. Related to evidence in literature referenced earlier that suggests that parents are seeking more advantaged populations by enrolling in whiter schools of choice, this pattern suggests they are seeking schools that serve more advantaged populations based on class.
The story above illustrates a subtle, yet pervasive pattern among families that leave the district: they are looking for “a place where the other families are going to be more like [them],” and where their children are safe and cared for. This pattern loops back to the beginning of this section where I described the intense, positive community that surrounds the TFHS athletics program. Those families have found people like them, and their children feel valued, recognized, and safe. The challenge for GMRSD organizational leaders was to figure out how to help all students and families to feel connected to a supportive community.

Need to Adapt to Changing Conditions

In 2016-17, the GMRSD was facing several overlapping and mutually-intensifying factors that require it to adapt to changing conditions. These were related to the issues outlined in this section, and also described in Chapter 3: a declining student population, increased school choice options, fixed costs and unstable finances, a diversifying student body in terms of race and class, academic concerns, disruptive student behavior, and family flight. In addition to all of these issues, the mascot debate consumed stakeholder attention for the entire 2016-17 school year, and highlighted social and political factions within the organization.

As a public school district, the GMRSD is responsible to serve all of its students, and to ensure they are able to achieve academic success as defined by current state policy. This is complicated by the district’s increasing diversity of its student body. They are in an unstable financial situation brought on by these demands and what they perceive to be inadequate state funding mechanisms for public education, coupled with increasing numbers of families who are choosing to access school options outside the district. Their academic programs are outdated, not currently supporting all students to achieve, and perceived as inadequate by
many families that have other options. Student behavior is an issue that prevents students from learning, and is also driving families away from the schools.

These factors and others are contributing to a poor reputation among some sectors of the community that are contributing to family flight and loss of resources. Simultaneously, the district maintains positive support for its athletics programs, which generate school pride, but are also deeply connected to the Indians mascot and the traditions surrounding it. In short, it was necessary for the district to engage in systemic change in order to continue to maintain viability.

Chapter Summary

This chapter outlines the basic elements of the GMRSD decision-making system during the 2016-17 school year. Major issues centered around difficulties the district was having in meeting its responsibility to serve all students. This included problems related to resources, academics, and student behavior, all of which were directly or indirectly related to family flight. Despite these issues, the district was consumed by a debate over the high school’s “Indians” mascot. Three primary groups were engaged in this debate: organizational leaders, localists, and regionalists. These groups had competing perspectives and interpretations of the issues, which influence their behavior. In Chapter 5, I explore how these elements interrelated during the 2016-17 school year to produce decisions.
CHAPTER 5

DECISION-MAKING IN THE GMRSD GARBAGE CAN

It’s 5:45 on a Tuesday night. I’m at a special forum set up by the school committee to hear community ideas about the Indians mascot, which is being held in the high school auditorium. As I walk into the lobby, there are two folding banquet-style tables set up by the auditorium door. The superintendent and another person are standing behind the left table and directing people to sign up on clipboards if they want to make a statement. I walk by them and into the auditorium. It is large and beautiful. The seats look new, and the blue carpeting is pristine. There are two aisles that separate the seating into two outside sections and a middle section that’s 3-4 times as wide. The floor slopes down to a large wooden stage from where I’ve entered. On the floor in front of the stage are two podiums with microphones. I see the school committee chair at the left one shuffling papers. To his right is a TV camera on a tripod pointed toward the podiums. Directly in front of me is the right aisle. To my left is a walking space between a row of seats that are built into the back wall, and the back row of the middle section. I would be easy to pass through here were it not for three TV cameras on tripods that are evenly spaced along this stretch of carpet. There are people at each camera setting them up, and black cords snake around on the floor underneath them. I sneak by and sit in the back left corner of the middle section.

I hear a man speaking loudly across the aisle from me. I glance over, and he’s talking to another man. “I saw some people from Amherst hanging around outside at the last meeting, which irritates me to no end because they don’t have any business being here.” The man is white and probably in his 50s. He has ruddy skin and is wearing an olive green baseball-style cap with a Harley Davidson logo on it, faded jeans, and a nondescript grey fleece shirt. He’s holding a clipboard on his lap that has blank copy paper clipped in it. There’s a ballpoint pen in his hand. His neighbor is sitting two seats away from him, leaving a space between. He’s about the same age, white, and very heavy. He’s wearing a royal blue baseball cap with the school’s white “Indian” logo on the front, and a light blue windbreaker jacket. A third man, also white, and about the same age as the other two, with neatly combed white hair parted on the side and a bushy moustache joins them, and sits in the row in front of them. He twists around with his arm on the seat back so he can face them. The room is filling up with people and the low sound of chatter drowns out the men’s conversation.

I see a young Asian photographer who had been at the September 27 school committee meeting. He approaches a teen boy, and asks him if he’s a student. They start chatting about sports because the photographer told him he was going to a football game in the next town after this. The teen says, “I’m presenting tonight,” to which the photographer replies, “Well, it looks like you have a lot more supporters than non-supporters here, so you should be fine.” I wonder why he assumes that the boy is presenting a pro-mascot position, but when I turn around to look at them, I see that he’s wearing a blue T-shirt with the Indians mascot on it. Many other people on my side of the auditorium are also wearing these shirts. I assume I’ve inadvertently chosen to sit on the mascot supporter side. The photographer adds after a long pause, “Everyone gets pretty emotional about this.” The boy says, “I was talking to the assistant principal, and he said no one cares what others think because everyone feels so strongly about everything. Everyone already has their minds made up, so they’re not going to be convinced by the other side. I’m just here because if it is going to change, I want to be part of that decision.”

- Fieldnote, GMRSD School Committee Forum, October 25, 2016

Introduction

Chapter 4 provided an illustration of the system components of an “organized anarchy” (Cohen, et al., 1972). The GMRSD has ambiguous goals related to what to do to
address family flight and lack of resources, unclear technologies about how to improve its academic programs and student behavior, and fluid participants, especially two groups that came into the system specifically to pay attention to the Indians mascot: localists, and regionalists. Now that I have mapped out the elements, participants, and context, this chapter describes system activities over the course of the 2016-17 school year. I begin with an exploration of participant attention. The middle section of this chapter tells the story of the year from various perspectives. I then describe social and political dynamics that influenced system activity, and how culture influenced behavior and attention. I end with a discussion of how participant learning influenced decisions that the system generated, which I outlined in Chapter 4.

Participant Attention

Despite all of the organization-level decisions that occurred during the 2016-17 school year, one issue dominated system activity—the Indians mascot. This was a highly-charged, emotional issue for many, as it was about the district’s identity at its core. In addition to the mascot, other elements included the district’s fundamental responsibility to serve all students, the increasing diversity and need of its enrolled students, their unstable financial situation, problems with academic programs, disruptive student behavior and bullying, community dis/engagement and relationships, and patterns of family mobility and flight. See Figure 5A for a diagram of system elements and participant attention.
Cohen, et al. (1972) state that participant attention is a significant influence within garbage can decision-making systems. This can be a function of participant presence, or of other demands on participants’ time and energy. For example, if a stakeholder is paying attention to GMRSD resource allocation, but never enters the system, then she does not affect decision-making. Similarly, if a participant inside the system is paying attention to the Indians mascot, but not to any other element, his presence will not directly affect decisions that involve other elements (he may indirectly affect other elements if his behavior causes another participant to interpret another element differently).

GMRSD organizational leaders were focused on all of these elements. This is at least partly the result of my sampling strategy that focused on elements that were discussed at school committee meetings. Localists were drawn into the system when the school committee decided to consider the appropriateness of the Indians mascot. They were
primarily focused on this issue, but used other issues to make claims that were critical of organizational leaders, even though they were not interested in them at an organizational level. Specifically, they claimed that considering the mascot was a waste of time and financial resources that the district could not afford, and threatened leaving if the mascot were to change (i.e., adding to concerns of family flight, but not paying attention to it as an issue). They also cited student behavior and bullying as a problem, but did not address the issue.

Regionalists were also drawn into the system due to their interest in changing the Indians mascot. Due to their focus on social justice, they were aligned with district leaders in their commitment to serve all students, and recognized that increasing racial diversity prompted formal consideration of the mascot in order to avoid harming students by perpetuating a racist stereotype. They also connected the mascot to school reputations and implied that it represented core values that were potentially contributing to family flight. They recognized the district’s financial instability, and worked to raise money to offset the costs of a mascot change. All of the participants were focused on community engagement in this inherently political process to consider the mascot. The next section outlines system activity, and how these differing perspectives influenced participant attention and behavior.

**System Activity and Perspectives**

This section tells the story of the 2016-17 school year as seen through the lens of the GMRSD school committee. I tell the story in a linear fashion, as events built upon each other, but there is a circular and interconnected quality to all of these actions as they are all elements that remained in the system during this time period. This is reflected in the systems approach through which I have been examining the interconnected nature of elements over time (Cohen, et al., 1972; Williams & Hummelbrunner, 2011). I start the story slightly before July 1, 2016, as this was when the Indians mascot issue was first raised and accepted into the
system by organizational leaders. The year progressed through the creation of a process to consider the mascot, opportunities to learn about related topics, a mid-year decision about the mascot that was unexpected, and the aftermath of this decision. Along the way, organizational leaders were responsible to continue to attend to all of the other elements as they engaged in the work of running schools, and supporting students and families.

**May 2016**

The superintendent met with a group of five Montague residents that included David and Jen, described in Chapter 4, who raised the concern that the Indians mascot was inappropriate. Two were elected Montague Town Meeting representatives. David and one other member were involved in the organization the Nolumbeka Project. Another worked in community and youth health programs in Franklin County. In light of later accusations that the issue was raised by people outside of the community, these participants’ identities are important.

This group stated that their “interests range from wishing to see it changed to hoping to promote school committee and public dialogue of the topic” (SC minutes May 10, 2016). The superintendent encouraged them to speak directly to the school committee, which they did on May 24. David took the lead on presenting, and he introduced the two main problems: the Indians mascot is disrespectful and inappropriate, and the term “Indians” and associated logo is a harmful, racist stereotype. He explained that the team name was inappropriate due to its origins in the bloody history of the area, and argued, “You’re naming the team Indians in a town, and a school, named after the man who killed every Indian he could find” (Montague Reporter, May 2016). David also cited a 2005 resolution by the American Psychological Association that recommended retiring all Native American mascots because they were harmful to the psychological well-being of Native American students.
They recognized the history and positive associations among community members. One member of the group was quoted as saying,

A little bit of a dilemma, I know, is for people that went to the school and played on these teams, or supported these teams – it’s part of an identity that they feel proud of [...] I think a lot of people are interpreting the meaning of the name differently, and that’s convenient, and understandable… But times change, and when you know better, you have the opportunity to do better. (Montague Reporter, May 2016)

The meeting was covered by the Montague Reporter, and The Partnership posted this article on their website. Otherwise, this meeting did not garner community attention at the time, thus their actions did not activate other elements in the system except by drawing organizational leader attention to something they defined as a problem (Cohen, et al., 1972).

The school committee said they would consider the issue, thus accepting it into the system.

July-August 2016

The school committee developed goals for themselves after engaging in a process facilitated by the superintendent in which they reviewed a document he had created that listed some strengths, weaknesses, opportunities, and threats that he had identified.

Strengths included organizational recognition of their high-needs student population, and a willingness to examine past practices and “support learning goals beyond MCAS.” Weaknesses included a culture of low expectations (social-emotional as well as academic), disempowered parents and families, weak accountability systems, insufficient collaboration time, lack of systems that supported student learning, and insufficient student engagement in higher order thinking and self-regulation. As opportunities, he identified community interest in “reinventing ourselves,” new administrative team members, and new systems and structures to support teaching and learning. Threats included insufficient funds, family flight, and strategies that were too ambitious and unfocused. The school committee chose three goals that were based on building better relationships with stakeholders. To this end, they
articulated to school principals at a meeting that they were interested in hearing from them about how they could be supportive (SC meeting minutes, August 2016).

Organizational leaders discussed ongoing facilities maintenance and capital improvement projects. It was not recorded in the minutes, but video shows that two facilities maintenance staff members attended a meeting to make a case for spending more money on the athletics fields, especially the irrigation system, or it would cost the district a lot more for repairs in the long run. One of them waved a paper around to show that he had attempted to communicate this to district leaders already, and implied that he had not been heard (SC meeting video, August 2016). This behavior mirrors the pattern of stakeholder attention to the state of the athletics facilities described in Chapter 4.

The superintendent hired two assistant principals, who rounded out the administrative team, and the team updated the district strategic plan for its last year at their August retreat (SC minutes, August 2016). In the updated plan, they specifically incorporated language focused on social justice, multicultural awareness, diversity awareness, and active citizenship (interviews, March 2018). The secondary principal told me that one of their main purposes was to embed a commitment to equity and social justice in that document because this was a way to document their core work (interview, March 2018). Minutes from a school committee meeting at which most of the principals were present state that “multicultural and diversity awareness […] is something that needs to be addressed in regards to the mascot,” and also connected active citizenship opportunities for students to the mascot process. At this meeting, principals reported to the school committee on their strategies for community engagement (SC minutes, August 2016).

The superintendent and school committee chair drafted a three-step process to consider the Indians mascot that included opportunities to “learn stakeholder interests”
through public forums and educational events, “develop a mascot selection process” by generating criteria and a proposal format, and “select a mascot” (SC minutes, September 2016). According to both of them in interviews with me, the intent was to engage in a learning process first to build a shared knowledge base, “then people would be prepared to weigh that among other considerations, like what kind of community do we want to be going forward?” (interviews, March 2018). After that, the school committee would consider a variety of community-generated proposals for a mascot, which they assumed would include the current Indians mascot based on its strong support among stakeholders.

**September 2016**

Decisions related to political action and stakeholder communication typified system activity in September 2016. The school committee voted to adopt a resolution against a question on the November state ballot that sought to raise the number of charter schools that were allowed in the state. The superintendent had informed them of this resolution in a prior meeting. After some discussion, they decided to add an amendment of their own that stated, “WHEREAS the Gill-Montague Regional School District has received NO discernible benefit from the improved educational practice that charter schools were promised to provide as innovators for the public schools” (SC minutes, September 2016). This was interesting in light of a collaborative science curriculum project that the secondary principal and superintendent had arranged with the Four Rivers Charter Public School later that fall, although it confirms research that found that one response to competitive threats is political action (Hess, Maranto, & Milliman, 2001b; Holley, Egalite, & Lueken, 2013). They finished hiring the last of the staff needed for the year, which included a school nurse.

Word of the school committee’s decision to consider the Indians mascot was getting out. Petitions were circulating on both sides, and they collectively gathered over 2,000
signatures. Jen submitted a letter to the school committee that appeared in the September 13 minutes. It said that she appreciated their willingness to consider changing the Indians mascot. The letter went on,


This quote raises several points that were repeated on the regionalist side throughout the process. Jen recognized that the majority of stakeholders were likely in support of the Indians mascot, and that they associated it with tradition, honor, and respect. She claimed that changing would be the “right” thing to do because using race-based stereotypes as mascots was no longer perceived as legitimate. The letter also connected changing the mascot to the district’s developing vision of “equity, social justice, and multicultural education.” She also referenced her role at The Partnership, and warned that funders may overlook them if the school mascot did not appear to align with the values inherent in this vision (SC minutes, September 2016).

After this meeting, the superintendent posted a draft of a mascot consideration process on the district’s Facebook page, and a reminder about an upcoming school committee meeting at which they would be discussing it. He made it clear that the meeting was about the process, and that no decisions would be made about the Indians mascot at that time. The post generated comments immediately (the first ones on any post that year).

The thread started:


[Post 1] As a taxpayer in the town of Montague, a current parent to a TFHS student and a graduate of TFHS, I find it ridiculous that this is where the school committee
thinks it should be spending its resources. Don't you think the priority in the district at this point would be to find out why we cannot retain students or teachers in our schools? I can speak for myself when I say that if my child was not a senior and graduating this year, we would most certainly be looking at other choices for his education. The lack of teachers and courses offered in our high school is disturbing and I feel the school committee would be better served to focus their attention on the real issues!

[Post 2] So either way, we are losing the Turners Falls Indian?

[Post 3] I hope not. They need to listen to the majority in town.

[Post 4] Yes, it has been decided already.

These first four comments (there were over 100 on this post alone) introduced some of the basic problems as perceived by localists.

First of all, the school committee was supposed to represent the “taxpayers” because they had elected them and their tax dollars paid for the school. The third comment suggested that this should be a majority vote, and the underlying assumption based on the “taxpayer” reference and this commenter’s suggestion was that the majority of stakeholders would be in favor of keeping the Indians mascot. Secondly, the school district had more important problems to deal with, such as family flight, teacher turnover, and inadequate course offerings, and they should not be spending scarce resources on this. The first comment also included a threat to leave, which indicates that family flight was not perceived as a personal problem, but a district problem. The second and fourth comments introduced a common assumption on the localist side that the process was a farce, as the school committee had already decided to change the mascot. These comments foreshadowed where localist attention was directed for the duration of the year, as well as revealed their perspectives.

General disrespect on the district’s Facebook page, which became much more extreme over time, appeared at this early stage in the process. In the superintendent’s next
Facebook post, he responded to the disrespectful tone of many of the posts on this page by writing,

Judging from the level of social media activity already occurring it is clear that this topic brings many social, historical, and cultural issues to the surface that deserve fuller consideration than can be achieved through social media. I would like to ask those who hold strong opinions on this issue to act with civility and I would like to encourage those who are asking questions and trying to understand others’ perspectives to continue to model this for us all. (GMRSD Facebook, September 2016)

The Greenfield Recorder published articles about the topic three days in a row leading into the September 27 school committee meeting when they would first be discussing this issue. The first focused on the petition to keep the Indians mascot, then mentioned why this was up for discussion, and foreshadowed the opportunity for the public to review and comment on the decision-making process that the superintendent and school committee chair had been drafting (September 14, 2016). The next announced the upcoming school committee meeting agenda item to review the process, provided a review of the arguments to change it, and said a petition in favor of keeping the Indians mascot would be presented at the meeting (September 15, 2016). The third was about how students at TFHS wanted to keep their mascot (September 16, 2016), and it included interviews with teens. The day before the meeting, the Recorder published an opinion piece by a former TFHS staff member titled “Keeping the Turners Falls Mascot Harms Native Americans” (September 26, 2016). The day of the meeting, it published a statement from the Nolumbeka Project against Native American-themed mascots (Greenfield Recorder, September 26, 2016).

September 27 School Committee Meeting

There was a large turnout at the September 27, 2016 school committee meeting, which I attended. All data in this section is from the fieldnote from that meeting, published school committee meeting minutes and documents, and video posted online by Montague
Community Television. When I drove up to the Turners Falls High School, the parking lot was full and there was a television reporter speaking into a camera in the parking lot. The TV studio inside the school where the meetings were typically held eventually filled with about 70 audience members who occupied every available space around a set of tables with microphones arranged in an oval. All of the school committee members filed in at approximately 6:25 and sat at assigned seats with name plates in preparation for the 6:30 start. Also sitting at the tables were the superintendent, director of business and operations, the executive secretary, and the student representative from the TFHS student council. All of the school committee members and district staff members were white.

At 6:30, the chair started talking to the room in a loud voice, saying that he was the chair and this meeting was about the process to review the school mascot, and “[wasn’t] a place to debate the relative merits of any side.” He stated they would accept a proposal with no discussion, and that there would be an opportunity for people to make comments on this issue, but not tonight. A man in the audience said, “So there’s no public comment tonight?” The chair explained that there was, but that people should keep their comments short. Another person asked if they wanted to hear from both sides, and the tone implied to me that the assumption was they did not. The chair apologized for using the word “sides” in his previous statement and said, “It’s really important to know that we don’t want to shut anyone up” in the discussion of the team name. The room buzzed with statements about what kind of public comment was welcome. The television reporter was standing by the hallway door with her camera at this point, and asked the chair to clarify the purpose of the meeting. He said it was to discuss the process to make a decision about the mascot.

The chair opened the public comment section, for which time is reserved at the beginning of every meeting, and presenters were invited to sit at an empty seat at the table.
next to the executive secretary. Jeremy, whom I described in Chapter 4, sat in the chair and started reading a prepared statement from the “Save the TF Indians Logo” petition that he was holding in front of him. He requested that the school committee keep the mascot as is because the mascot and logo “belong” to the “taxpaying citizens.” He also asked that the school committee table the request to have a process to discuss the mascot, and instead conduct this as a town-wide process because it would be in the “best interest” of the town to put money designated for schools toward education instead of “the issues of a few people.” He launched into a defense of the Indian mascot, claiming that it was part of the school’s history, and that the goal should be to “educate, not eradicate” this history. This garnered applause as well as eye rolling and grumbling among audience members.

A man sitting in the audience asked the chair to clarify that they were only supposed to discuss the process. Several people nodded their heads vigorously. The chair agreed, but not until after Jeremy had read a large portion of his prepared statement about the merits of the mascot. He rose from the chair, and was replaced by Lew, a heavy white man wearing a blue baseball cap and glasses. He started by identifying himself as “class of 1980,” and added that he had been a teacher and coach in the school district, and that his parents had also worked for the schools. He requested that they keep the Indian name and logo because of school pride. He tried to explain why the mascot instilled pride, but several audience members loudly protested, asking how this was about the process and not about the merits. The chair exclaimed, “You’re killing me here,” and it was not clear if he was talking to the man, or to the protesting audience members directly behind him. The Chair asked him to state his request, and he said, “We’re all here for a reason, and my reason is [...] please consider everything your alumni and students feel about this.” The chair announced that there were five more minutes for public comment.
Rhonda, whom I described in Chapter 4, sat in the empty chair. She was wearing a T-shirt that said “Not Your Mascot.” She addressed the school committee in an Indigenous language, then translated to English. She said that “the real issue that’s been ignored, or even silenced, is that there's been no consultation with the direct linear descendants of those killed in the massacre.” This was greeted by loud applause and cheering from the audience. David made a statement similar to those he had been making in previous public statements about how the Indians mascot was inappropriate, disrespectful, and harmful. He presented to the school committee the “Change the Turners Falls Mascot/Logo” petition. These four people—Jeremy, Lew, Rhonda, and David—were the only ones that appeared in the meeting minutes.

The following speakers and their input were not mentioned in the minutes. A woman sat at the table and pointed out that the proposed process did not allow for a broader conversation with Indigenous people who live in the community. The next speaker was a man who read a statement on behalf of his grandmother whom he identified as Mohawk. It said their family had lived in Montague for 60 years and they had no problem with the name. A woman stood up in the audience to say that she lived in a nearby town that recently went through a process to change their school mascot due to its racist history, and that they “fought to rid themselves of the stigma.” She encouraged everyone to listen to each other with open minds. An older woman sat at the mic and identified herself as Inuit and a resident. She asked the committee to vote no on changing the mascot, and Jeremy interrupted her to ask how this was about the process. The chair asked the woman to stop, and the room erupted in sounds, gestures, and comments about how others were allowed to read most of their statements in favor of the mascot. Someone near me said, “Now you
silence people.” The chair then said, “OK, moving on...” and ended the public comments section.

The school committee then discussed the draft decision-making process. Several members felt that there should be a strong education component, and that it should be as inclusive a process as possible to ensure a diversity of perspectives. They discussed completing the process prior to May 1 to avoid a change in school committee membership, which occurs in mid-May each year at town elections. This would have precluded information gained through a town referendum on the topic, as Jeremy (as well as David and Jen’s group) had originally suggested. A school committee member said that the process should be as quick as possible to avoid a long period of hostility and division in the community. A woman in the audience whom I assumed was white asked how the school committee would ensure the process would not be affected by bias because the draft process implied that the outcome was to change the mascot. This prompted accusatory comments about how she had been allowed to speak. Rhonda asked people to “please be aware of the unbalanced power in the room when we have these discussions,” which I interpreted as a statement about racial imbalances. A woman called out from the audience that she was a taxpayer, and that this was about her children. Her tone was tense. This prompted muttered audience comments such as, “It’s all about you,” and the chair said loudly above this, “We all need to hear what everyone has to say.” A school committee member explained to the room that the intent of the proposal was not to imply that they were leaning toward one side or the other.

The chair opened the meeting to public comment again. A young woman of color was invited to speak and said, “It should only take one Native, Indigenous person, to say no” for the mascot to be changed. This prompted head shaking and grumbling from some in
the room, and nods of support from others. A black man said, “Education is the biggest part of it. I’m convinced that if [people are] educated then they wouldn’t be for a racist symbol.” There were audible gasps and comments such as, “It’s not racist” around the room, which was primarily filled with white people. The man clarified that his comment was about the symbol being racist, not the community. A white woman asked the school committee, “How broad are we going?” Rhonda replied, “How broadly does this affect people?” No one answered the question. Throughout the meeting, suggestions about who should decide included: taxpayers; citizens; students; alumni; tribal chiefs and council members from local Indigenous communities, residents of Gill, Montague, and Erving; people connected to the school (e.g., teachers); and parents of students who had chosen in from other towns. One audience member suggested that no one should decide because “this is a civil rights issue, and you don’t vote on civil rights,” implying that it should be changed on principle. Who should decide and on what basis were major questions in the system throughout the year.

The discussion about the process began to wind down. A school committee member asked the student representative, who had been sitting silently at the table the whole time, if he had anything to add. He said, “I’m just here to do my report,” which ended up being about spirit week events, fundraisers, a pep rally, and booster day (i.e., he did not weigh in on the mascot issue at all). The room had become extremely hot, and people started to filter out as soon as it was clear that nothing about the mascot would be decided that day. One school committee member announced to the room that they welcomed people at every meeting, and that their agendas were posted online. As people were flowing out of the room, she added, “We have other important decisions to make, and we welcome your input.” This type of behavior was typical for the remainder of the year. With a few minor exceptions that I describe below, stakeholders outside of organizational leaders did not enter the GMRSD
decision-making system for any other reason than the mascot aside from a short-lived issue surrounding a potential decision to consolidate grades at Gill ES that did not occur.

The school committee eventually voted to accept the draft mascot consideration proposal with clarification that there would be at least two community forums, and that part one (“Learn Stakeholder Interests”) would be complete before moving on to part two (“Develop a Mascot Selection Process”). The meeting agenda had several more items on it, including reviewing and approving the superintendent’s goals for the year, a report on capital improvements projects that were underway, a discussion of the district’s homework policy, and deciding how to handle school attendance on election day when the Hillcrest ES would be used as a polling site. The only people who stayed were myself and two reporters. Even the student representative left. I discovered later that everyone there, aside from the superintendent whom I had already met, assumed I was a reporter as well.

**October 2016-January 2017**

Between October 2016 and January 2017, the GMRSD community engaged in the mascot consideration process as it had been planned by the school committee. A brief recap on the garbage can system is in order. Based on Cohen, et al.’s (1972) model, the system was under heavy load due to the wide range of elements present, as described in Chapter 4. Participant attention was focused on the Indians mascot, but from different perspectives and with competing interpretations, which increased conflict and load. Available energy in the system was focused primarily on the mascot element. The school committee had restricted decision access by stating that it was making the decision, and by controlling the process by which this would occur. The model predicts that specialized decision access is an influential factor in how elements interrelate to produce decisions. The decision consideration process was designed to focus on stakeholder learning focused around a set of essential questions.
What is the significance of the Indians mascot to the community? How are Native American-themed mascots conceptualized in a wider context? How do local Native American representatives and groups perceive the Indians mascot? How might this mascot affect enrolled students, considering the increasingly diverse set of families that are engaged in the GMRSchools? What are the potential consequences of changing it, or not changing it? This section outlines participant behavior from October through January within this context.

**Montague citizens plan town referendum.** The localists began to circulate the idea that a majority vote through a town-wide referendum would be the best way to decide on the Indians mascot, as Jeremy had suggested this when he introduced the petition to the school committee. This would, ostensibly, shift decision-making access away from the school committee. To increase their ability to promote their perspective, localists Chris and Marisa set up a Facebook page called the “Save the TF Indians Logo,” which served as an information sharing site, and a way to organize localists. Chris did most of the posting. On October 4, the Greenfield Recorder published an article about this potential referendum, and quoted Chris as claiming this was a means to gauge interest among residents as opposed to the petitions, which he claimed could be signed by anyone. Jeremy was quoted in the article as saying “I don’t think it belongs with the School Committee, it belongs to the townspeople and those in the district.” Chris posted two reasons on the Facebook page: 1) the school committee should be focusing on educating children, and 2) since this was not an educational matter, it should be decided by the town. He consistently referred to the referendum as a “vote of taxpayers,” despite the fact that paying taxes and being eligible to

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10 Chris maintained the “Save the TF Indians Logo” page; however, for simplicity I refer to the this as Chris’ page. Chris also maintained a personal Facebook page, and he sometimes commented on the other page using this account.
vote are not necessarily the same. One frequent commenter on the page bolstered this strategy by posting several references to other Massachusetts school districts that had engaged in similar debates over their mascots, some of which had attempted town referenda.

A week later, Chris referenced the school committee’s repeated claim that they were interested in community input by posting on the Facebook page, “There’s no reason I can think of that a referendum wouldn’t give the committee the sought after information they are so desperately seeking.” Later, Chris posted a letter that he claimed he had given to the school committee that started, “I’m writing today to ask the school committee to make a statement to the community that YOU ARE our voice and vote OUR conscience not your own and with that allow a referendum so that you’ll know the peoples opinion.” He suggested that people in support of the Indians mascot “flood them with emails.” The October school committee meeting minutes made it clear that the school committee was well aware of this movement. The minutes state, “The chair inquired if the committee wanted to discuss the referendum that community members have brought forth to the town. The committee felt that it is not a matter for the committee to be dealing with.” This statement made it clear that their intent was to stay out of it, and pay attention to their process.

On November 1, Jeff, whom I described in Chapter 4, appeared before the school committee to tell them that he planned to propose a town-wide referendum on the mascot. According to a Recorder article, “[Jeff] said the referendum would be non-binding, meaning that whatever the town voters decide, the school board does not have to follow it. The vote would be just a recommendation to the School Committee.” The article went on to explain
that the school committee had discussed completing their process before May\textsuperscript{11}, which would predate the town election. The article also reported that the school committee chair had expressed in that meeting that there were rumors of death threats surrounding the mascot issue. It quoted him as saying, “As far as I know there’s no basis of fact for that concept,” but that anyone who received or saw a death threat should contact the police. This shows how heated the mascot debate had become in the community.

**Public forums.** In line with their efforts to maintain transparency and communication, the superintendent posted dates, times, and a draft format for two public forums on the district’s Facebook page in October. The post ended with the statement, “We are all reminded that these forums center around the life of a school community, whose mission is continued growth and learning.” According to the comments under this post, there was an area of agreement localists and regionalists that this format would neither promote dialogue nor learning. One comment explained the typical reaction:

I think the three minutes in this setting is fine to make your brief point for or against. However, I absolutely believe that there should be follow up meeting(s) with the school committee and representatives from both “sides”, for lack of a better term. There are always going to be those for and those against. However, neither the online opinions, nor those that will happen at the forums, have been part of a discussion. They have been back and forth banter. I truly hope that this is taken to the next step and that the forums are not all that is happening. (GMRSD Facebook page, October 2016)

For a process intended to support “growth and learning,” the lack of dialogue was a concern. Jen appeared at the October school committee meeting to express similar concerns that there did not seem to be any opportunities for dialogue. She offered space and facilitation through The Partnership for this to occur, but no one took her up on the offer.

\textsuperscript{11} The school committee had discussed this in September as well, but this had not been reported on. In addition, inaccurate reporting led to some misconceptions about the decision (e.g., saying the school committee would decide by “the end of school”).
Lack of space for discussion resulted in most of the public debate about the mascot occurring on the district’s Facebook page. This moved system activity into a virtual realm. Comments on this page during the 2016-17 school year were almost exclusively related to the Indians mascot issue. The superintendent, who managed the page, posted bi-weekly district updates that he aired on the local radio station, district news and events, and weather cancellations. These received almost no comments, confirming that participant attention was solely focused on the mascot. In comparison, posts related to the mascot issue drew hundreds of comments, and the tone was often disrespectful. One interview participant referred to it as a “swamp” (interview, March 2018).

I asked the superintendent if he had read all of the comments, and he said “most of them” (interview, March 2018). He told me that some people had suggested shutting off the comment feature, but he declined to do so because he thought it was “healthy” to allow people to have dialogue and express their opinions. School committee members and the superintendent explained to me after the fact that at this stage in the process, and with the anticipated number of forum attendees, small-group facilitated dialogue would not have allowed people to be heard by a large segment of the community, and would have been logistically difficult (interviews, March 2018). People were able to voice their opinions and ideas, and be exposed to others’ opinions and ideas, but these formats did not facilitate learning unless participants were open to it and did it on their own or in private settings. School committee members described to me that they engaged in conversations about this topic with their family members, neighbors, friends, and acquaintances, and that they knew of many others who did as well (interviews, March and April 2018).

In their discussion of the forum format, the school committee talked through logistics that highlighted larger concerns around potential disruptive stakeholder behavior.
and ensuring student voice. They attempted to think through all of the potential pitfalls, and make proactive plans to address them (e.g., communicating a plan up front about how they would handle it if more speakers signed up than there was time to accommodate). Some members expressed worry about conflict that might arise. One cited the “blatant disregard for the speaker” that they had witnessed in a prior school committee meeting (SC meeting video, October 2016). The chair said that they could have a plan to remove disruptive people, but he thought that “police presence” might send the wrong message. They decided that they could turn off the microphone if anyone said anything inappropriate, and to remind everyone up front about being civil.

They then discussed how to make sure students knew about these forums, and that they were welcome, as well as setting up a students-only forum during school hours in case some felt uncomfortable speaking in front of a large group of adults. One member suggested that some students might be uncomfortable expressing their opinions in front of their peers. This concern was related to the perception conveyed to me by several secondary school employees that most TFHS students were in favor of keeping the mascot, and that many of those in favor of changing it were reluctant to state their views publicly (interviews, October 2016-April 2018). School committee members talked through some of the wording, and then voted on the format with these proposed changes. Two forums were held in October and November (with arranged plain-clothed police presence), and were well-attended and occurred without major disruptive incidents. I describe community perspectives that were revealed in these forums later in this chapter.

Inquiry events. The superintendent took the lead on discussing the format for the inquiry events in which speakers with specialized knowledge about topics related to the mascot would make presentations to the school committee in public events, and engage in a
question and answer period. As described to me by the superintendent and three different school committee members, the purpose of these events was to help the school committee to build knowledge that would allow them to make informed decisions in developing criteria in step two of the process (interviews, March 2018). Two members explained to me that this felt similar to what they were already expected to do to prepare for each meeting by reviewing agenda packets, and talking to staff and community members in order to make informed decisions about district business. All of the school committee members I interviewed expressed this responsibility as a key component of their role (interviews, April 2018). A parallel purpose of the inquiry events was to educate community members, although they would not be directly involved in making the decision.

The superintendent suggested topics and speakers that included: pre-Colonial Native American history and culture, King Philip’s War and the events of the 1676 attack near Turners Falls, local Native American representatives sharing their perspective on the Indians mascot, citizens speaking on the meaning and importance of the Indian mascot, and an academic presentation on the nature of stereotypes, prejudice, and oppression (SC minutes, October 2016). In addition to these events, the superintendent said that he had been working with the secondary principal to arrange educational events for middle and high school students on similar topics.

In November, the superintendent used one of his bi-weekly radio spots to announce the planned inquiry events, and invite the public. He concluded with the statement, “Regardless of the outcome, it is worth noting the school committee’s commitment [is] to open-minded learning and respectful dialogue, qualities we can all exercise and value” (GMRSD Facebook page, November 2016). Speakers that were eventually selected were aligned to the suggested topics. In order to provide a range of perspectives, organizational
leaders had sought to find representatives of local Indigenous groups who were in favor of keeping the Indians mascot, and were unable to find any. In emails to school committee members, and in person at a meeting, Chris suggested nationally-known speakers who identified as Native American and would present a pro-Indians mascot perspective, but the superintendent and school committee did not engage them, citing the fact that they were not local (SC minutes and video, November 2016). In December, the superintendent posted twice on the district’s Facebook page that they were looking for pro-mascot alumni and local Native American representatives to talk to the middle and high school students.

The first speaker was an historian who provided a detailed history of Indigenous culture and history in New England leading up to and including King Philip’s War, and the events that took place at what is now Turners Falls. His presentation was well-received by localists. The “Save” Facebook page posted a link to the video with a thank you to the professor, and encouraged people to watch it, and other posts later in the year also referenced how informative and unbiased this presentation was. What is interesting about this positive reaction is that this professor specifically talked about how the TFHS Indians logo was created in 1913 because it was in fashion to use these images at that time, and not due to an intent to honor local Native Americans, or to connect it to the battle at Turners Falls. He said, “It’s only become a cause célèbre since somebody brought it up because you want to get rid of a logo” (inquiry event video, November 2016). He went on to explain that in the early 1900s, local Indigenous communities had been gone from New England for a hundred years, and local people at the time did not think about them as modern people. He said that they selected the Indians logo because “it was an aggressive beast just like catamounts and bears and cougars.” He also referenced a trend during that time period of baseball teams using these names. He said that this type of labeling was possible in the
northeast U.S., as opposed to in the west, because the violent history between Indigenous people and white Colonists was so far removed from people’s memory. As a result, he said, “You could sell it.” From his perspective, the Indians mascot was a marketing decision.

The second inquiry event speaker focused on the social justice perspective. This was a UMass professor in the College of Education, who identified herself as an “educator of multicultural and social justice issues” (inquiry event video, November 2016). She presented an overview of research on the “Impact of Using an Indian Logo and Nickname” that showed that “even if images are positive, they are still stereotypes,” and these can be harmful to Native youth even if they accept them as positive symbols. She then outlined “exemplary processes” to build knowledge about other cultures by engaging in dialogue. She referenced the GMRSD’s core values of persistence, integrity, empathy, and continuous learning, and said that their work was to engage in a transformative learning process around the mascot based on these values.

The third inquiry event featured two local Native American representatives, a chief of the Hasanamesit Nipmuc Nation, and an Amherst College professor who was Abenaki and had done extensive research on local New England Indigenous people, including first-person historical accounts of King Philip’s War from the Indigenous perspective (SC minutes, November 2016). They clearly stated that local Indigenous groups were opposed to Native American-themed mascots. A school committee member I interviewed said that people had noticeably walked out of this event in the middle, and assumed it was people who were in support of keeping the Indians mascot (interview, April 2018).

In response to increasing criticism from localists about the cost of speakers, and claims that they were biased in favor of removing the Indians mascot, the December school committee meeting minutes contain notes that state that the inquiry event speakers had not
been compensated, and that the district had paid $2,000 to the Mashantucket Pequot
Museum for speakers for additional educational events they had arranged for secondary
students. A TFHS graduate and parent of a high school student told me, “They took them
out of classes to go listen to these people talk, and just talk against it and give them all the
reasons why it should be changed, and whatever...mostly white people [...] I was a little
pissed off that they took my kid out of class for that” (interview, April 2018).

In school committee meeting minutes, the superintendent is represented as saying,
“He feels that the goal with student presentations is not to have unbiased presenters as
everyone has biases but rather to present the student body with a range of perspectives” (SC
minutes, December 2016). When I asked him about perceptions of bias on the localist side,
he said there was a neutral historical account, a local Native American perspective, a person
who talked about social justice and racial inequality, and pro-mascot community members.
He added, “It’s presenting people with something they need to think hard about. You can’t
perpetuate ignorance. It’s antithetical to being an educational institution” (interview, March
2018).

The “Turkey Day” football game incident. An incident directly related to tension
around the mascot issue occurred at the annual Thanksgiving Day football game between
TFHS and their rival, Greenfield High School. Students engaged in the prohibited
“Tomahawk Chop” and war chant (described in Chapter 4). This student behavior, and
apparent condoning of the behavior by coaches, was interpreted by people I interviewed as a
direct challenge to the superintendent and school committee. The superintendent stated this
clearly later on in a memo he posted on the district’s Facebook page when he wrote, “the
wearing of the headdress and the public display of the chop and chant by the football team
on this particular occasion, in the middle of a district review of the Indian logo/mascot, was
clearly intended to send a message, a message many have found to be insensitive, offensive, and provocative.” The superintendent and secondary school administrators questioned the students involved when they returned to school, which was interpreted as excessively punitive, and prompted outrage from Marisa, Chris, and Tammy, who appeared at the next school committee meeting. The local sportswriter for the Greenfield Recorder wrote a piece about this incident, citing how negative and divisive the mascot issue had become for the entire community, and how people on both sides were being disrespectful. He wrote, “Have we forgotten that these are people involved?” (Greenfield Recorder, December 2016).

At the meeting, Chris pointed out (correctly) that the policy only referred to banning the chop and chant for the marching band and cheerleaders, and was referenced in meeting minutes as saying that “he felt that the football players and the coaches were bullied.” He also used this term on the “Save” Facebook page to describe administrative response. Tammy and others responded to this with comments about how the superintendent should not have “interrogated” students about the incident without parent permission or presence. This led to a comment by Chris: “I think its clear what Mr Sullivan’s agenda is. Time for a new superintendent. No doubt about it.” He also suggested that people run for school committee in the spring, and specifically referenced Marisa. She posted a letter on this page describing her involvement in the events of 2008-09. She wrote,

As a person who was raised to respect every culture and whose genealogy had recently been traced back to the Cherokee nation, I felt as though it was important, and appropriate, to ask permission from the local tribes as well as the Seminole Indian Tribe regarding our schools use of both. Emails to local indigenous tribes went unanswered but the Florida Seminole Tribal Chief did respond. I read my letter to him and his response to the SC. He gave unwavering support to TFHS in their use in the manner it was intended, as a call to “battle” in the throes of a big play or game. He wished us luck in keeping the use. The committee, comprised of 10 Caucasian people - none of whom claimed any Native American descent - ignored the Tribal Chiefs granting of permission and voted to ban the “chop” and “fight song”. (Save the TF Indians Logo Facebook page, December 2018)
In this statement, Marisa identified herself as having Indigenous ancestry, and described a process of including Indigenous representatives in a GMRSD decision that had been disregarded by past leaders. Her statements express the opinion that GMRSD leaders were being disingenuous by claiming to value the perspectives of Indigenous people with regard to these traditions.

This incident highlighted competing perspectives among Indigenous representatives, and was seen by localists as an example of school committee hypocrisy and bias. In the second inquiry event focused on the multicultural and social justice perspective, the speaker outlined “exemplary processes” to build knowledge about other cultures by engaging in dialogue (inquiry event video, November 2016). She gave the example of Florida State University working collaboratively with the Seminole tribe to use their image and traditions in the context of their football team in order to insure the tribe considered this use an honor. This mirrors the process Marisa described to reach out to the Seminole tribe in 2009. This inquiry event speaker explained in the ensuing discussion that the same images and gestures could be interpreted in different ways depending on the context, and that engaging in dialogue with the Native Americans being represented was critically important to build knowledge and work cooperatively and respectfully.

From the localist perspective, the school committee’s decision in 2017 to ban the traditions, and to redefine them as discriminatory, disregarded the Seminole perspective. Meanwhile, organizational leaders had privileged the local Indigenous perspective that these traditions were racist stereotypes and represented cultural appropriation. Their perspective had prevailed due to their direct and exclusive access to the decision, but inflamed localist arguments of school committee bias.
**Other school committee business.** While all of this activity around the mascot was happening, the school committee and administrative team continued to focus on other elements in the system. The superintendent informed the school committee that students had not performed as well as they had hoped on the state MCAS tests in the prior spring. As a result, the district would remain at “Level 3” based on the state’s rating system. The high school had dropped from “Level 2” to “Level 3” (each school within a district is also rated, and the district is leveled at based on the rating of its lowest school). Graduation rates had also fallen. This was evidence that they were taking state regulations seriously, yet were not currently seeing positive results in terms of meeting state benchmarks.

The superintendent reported on his political activity regarding the charter school ballot question (e.g., speaking to the League of Women Voters), as well as his work with the MA Rural Schools Coalition. After the state election in November, in which the charter school ballot question did not pass, the superintendent reported that he and the secondary principal had met with the head of the Four Rivers Charter Public School. Minutes state, “I felt that now that the charter school referendum question has passed [in time] it would be a good time to see if they might have some practices we can learn from.” He also said that they were attending the Coalition of Essential Schools Fall Forum, which is a gathering of educators who are focused on progressive pedagogy. His report states,

> Our two visits this week may suggest that we are exploring ways in which we might consider reinvigorating the way things are done at the middle and high school. If these visits generate more than just some percolating ideas we will soon invite faculty, parents, and school committee members to engage in further exploration.

This is evidence that he continued to use his progressive pedagogical perspective to address what he perceived as problems with the academic program.

Regarding student needs, the director of pupil services reported on “increasing therapeutic needs” and “increasing needs of special education due to enrollment changes.”
The school committee representative to the MA Association of School Committees (MASC) reported on a workshop she attended at their annual conference on working with disruptive students. The superintendent shared news at the December meeting that The Partnership had been awarded a Safe and Supportive Schools grant to fund work in the secondary school. He explained,

This work is intended to help schools create safe, positive, healthy and inclusive whole-school learning environments and make effective use of a system for integrating services and aligning initiatives that promote students' behavioral health (e.g., social and emotional learning, bullying prevention, trauma sensitivity, dropout prevention, truancy reduction, children's mental health, foster care and homeless youth education, inclusion of students with disabilities, substance use prevention, positive behavioral approaches that reduce suspensions and expulsions, and other similar initiatives).

The superintendent handed out a packet of information about multicultural and social justice education and affective learning to the school committee, expressing his intent to help them to learn more about this category of education. He returned to these documents at another meeting in January. Here, he revealed a personal belief in the power of social and emotional learning to improve student learning, as well as his commitment to social justice and equity.

The director of business and operations reported on capital improvement projects, and collaborative work with the towns to obtain state funding for some of these. She shared financial loss and income numbers due to interdistrict school choice and charter school enrollment. She reported that they had lower-than-expected Erving tuition enrollment, and their special education costs were higher than expected. They voted to adopt four MASC resolutions that sought to increase resources for public education at the state level (a political response to their pervasive resource issue). The director of information technology presented her recommendations for technology acquisitions and upgrades related to student learning. Throughout the year, the student representative reported on student activities, and fundraising efforts to support them. He rarely brought information to the school committee
from the student body (e.g., in October, he mentioned that students had concerns about Internet connectivity in the schools and technology that was not working), and noticeably did not convey information regarding the student perspective on the mascot issue. The student representative’s behavior in the system is interesting in light of multiple data points that indicate strong support for the Indians mascot among TFHS students.

There was evidence of a pattern of school committee attention to system elements that resulted in issues being raised, then forgotten. The chair told me that there had been a long-standing pattern in which a school committee member would raise a concern, and they would have an initial discussion to clarify it, then ask for information to be brought to the next meeting. Information would be presented at the next meeting, and they would discuss potential solutions and plan to make a decision at a future meeting. Then the process would stall because no one would make a motion to decide anything (interview, March 2018). This pattern occurred four times in 2016-17 regarding homework policies, inequitable participation in the Nature’s Classroom trip among elementary schools, moving school committee meetings out of the video classroom in the secondary school to manage space conflicts, and considering switching the district to solar power.

I asked the chair if the mascot issue had sidetracked these discussions. He explained that although the mascot issue took time and attention away from other things, this was a typical problem for them that they had not yet figured out. These examples appear to be cases in which problems were introduced, but had no external pressure or clear directive to solve them. None of these problems had stakeholder pressure behind them, or a recommendation by the superintendent. In the absence of clear pressure one way or another, the school committee appeared to have a habit of allowing decision-making processes to stall.
January-February 2017

By January, the tension in the GMRSD community around the Indians mascot debate was thick with hostility and conflict. The school committee held its alumni-focused, pro-Indians mascot inquiry event. Like the other events, it was sparsely attended. It featured a graduate from 1947 who spoke for approximately six minutes (inquiry event video, January 2017). He started by stating that when he was in school, the Indians symbol was not noticeable “except maybe on a pamphlet or in the yearbook.” Their sports uniforms did not feature it. In an effort to provide context for the tradition of the Tomahawk Chop, he gave a rambling string of thoughts about raised arm gestures that TFHS cheerleaders did when he was in high school as well as modern day teams all over the country, and explained that these gestures meant “go team go!” He said, “When I played sports here, we always figured that the Indian was a warrior, and that we were the warriors, and we were trying to beat the other team.” He added emphatically, “I think there’s a lot to do about nothing.” He then gave an impassioned speech about how the school committee did not have the right to change the mascot, and that the town should decide because it was a tradition embedded in the town. He ended by doing the chopping gesture and saying, “Go team go!” (inquiry event video, January 2017). This statement, which was intended to represent the pro-mascot perspective, highlighted competing views among localists of the importance of the Indians symbol.

Jeff had volunteered to speak at this event, although not as an alumnus, but as a parent of an adult child who had attended TFHS. He talked about how he had taught a college course on Native American history at Boston College for three years, although this was not his primary area of expertise, and he claimed that the history was “fascinating.” He recounted his transformation from a neutral position on the mascot to one of strongly feeling that the town needed to have a say through a non-binding referendum. He
mentioned that he was no longer allowed to write things for the local papers because his
views had become too extreme, then made the following statement:

In following the mascot issue, I’ve gone through a bit of a transformation. I kinda hesitate to talk. I’ve only lived here for 15 years, and I’m an academic, so my viewpoint... [he trailed off here, but his statement implied that he was considered an outsider]. Basically I started as a typical liberal, anti-mascot person, and the reason is that these Indian mascots proliferated in the early part of the century and we named sports teams after bobcats and bears and Indians, and it’s just...it kinda seems like there’s something a little bit wrong with that. [...] I realized it wasn’t that negative and wasn’t really a mascot, just a logo and a tradition. The anti-mascot group was over the top, comparing it to Auschwitz and slavery...all sorts of extreme analogies were made—we’re all racists, not intentionally, but we’re all racists—I felt like the anti-mascot movement has initiated this process, but isn’t reaching out to the people in this community, and trying to convince them of their point of view in a language they can understand. They’re in a little bit of a left, liberal ideological bubble. (inquiry event video, January 2017)

Here, he was expressing the idea that the Indians mascot was problematic, but that the real problem from his perspective was that regionalists were framing it as a racist issue—and implying that supporters were racist—and not effectively engaging them in dialogue. This put responsibility on those who supported a change, and relieved those who supported the status quo from being responsible to understand why the mascot was problematic. Jeff went on to say that he felt it would be a mistake to make a decision in this context. He suggested that regionalists likely had a lot of political influence that they could use if they went out into the community to initiate dialogue, and that this could sway the town vote.

Jeff’s statements during this event highlighted his own conflicting perspectives about the mascot. He acknowledged that the mascot decision was the school committee’s to make, but that they should wait to do so after hearing from the majority of people in the town. When challenged by a school committee member on the apparent disconnect between recognizing that the Indians mascot was disrespectful, and knowing that the town would likely vote to keep it, he reiterated his claim that the symbol was not a disrespectful stereotype as interpreted by supporters. He added that “if you’re just interested in getting rid
of the mascot, then we have nothing.” This statement showed how he had adopted the localist perspective by internalizing what it meant to be an “Indian” in the context of school pride, which allowed him to justify its existence despite what he logically understood about how it was perceived in the wider world.

At the first January school committee meeting, after this event, Chris appeared to suggest nationally-known speakers who identified as Native American and would present a pro-Indians mascot perspective free of charge if the district would pay their travel expenses (SC minutes, January 2017). The chair and superintendent told Chris that they had not reached out to these suggested speakers because they were not local. Tammy was also at this meeting, and she criticized the school committee for the cost of the process. She and another woman claimed school committee members and school staff were behaving inappropriately on social media with regard to the issue. One member she specifically named stated that she had not done what she was accusing her of doing, and said she would be happy to talk in person about it. Tammy and the others left while she was talking (SC video, January 2017).

The school committee then engaged in a long discussion about whether or not to make another effort to find a pro-Indians mascot Native American speaker. Several members talked about how things were divided and emotional, and they wanted to move on to step two of the process as quickly as possible. One member “expressed frustration with the harassing emails and phone calls” (SC minutes, January 2017). One said she did not think that finding a pro-mascot Native American speaker was a good idea because “the elephant in the room” was that people were angry. She said, “I'm not sure if you had 300 speakers that people would be satisfied.” Another said that she wished the process could be less polarized. She referenced their core value of empathy, and reflected that people could listen to any
speaker, but they were not hearing anything because everything was so emotional. The chair mentioned that it could be perceived as a more balanced and inclusive process, especially by students, if they arranged a pro-mascot Native American speaker. They did not resolve this discussion by the end of the meeting.

Community division continued to prevail throughout the winter. At the second school committee meeting in January, Rhonda and another localist appeared to give appreciation for their work on the mascot issue. Rhonda said that “over 55 Native Americans in our local area have had the opportunity to come and speak at the forum events that were held. Approximately 10 Tribal Nations have been represented at the forums” (SC minutes, January 2017). In mid-January, the Greenfield Recorder published an editorial on the topic claiming,

After more than four months of hearings and discussion, both public and private, many minds are made up, and little, if anything, is going to change that thinking. Bringing an outside speaker, with no true connection to the region or understanding of the area’s place in history, will add little to the conversation. While it’s commendable that the committee has tried to be inclusive and thorough, we think the committee can be forgiven for skipping this final step. (Greenfield Recorder, January 2017)

The fact that the primary local news publisher had weighed in with this opinion enraged the localists. Chris posted, “I for one will no longer be part of their warped and one sided view of this issue. I removed myself from consideration and will no longer be interviewed by them” (Save the TF Indians Logo Facebook page, January 2017). After this, the “Save” page regularly included disparaging posts and comments about the newspaper and its reporters and editors, claiming extreme bias and unprofessional journalism. At the second meeting in January, through a series of votes and with significant discussion, the school committee voted to change the process and have an up-or-down vote on the Indians mascot, possibly
as early as the next meeting. The Greenfield Recorder reported on this change, and groups on both sides of the issue went into political high gear. Tensions mounted.

In early February, the Montague town select board considered the localists’ proposal to have a referendum on the Indians mascot on the town ballot in May. The yes/no question read,

We advise that Turners Falls High School retain its Indian logo but alter the image to be more consistent with indigenous cultures in our region. We also advise that the Gill-Montague School District implement this change in conjunction with the expansion of its curriculum to include Native American history and culture, collaborating with tribes and Indian organizations in the region in this effort. (Greenfield Recorder, February 2017)

Jeff presented the rationale for the referendum. He said that he was in favor of keeping the Indians mascot, but updating the logo to be more culturally appropriate. David spoke against it, saying the local Native American tribes were uniformly opposed to it. He cited the extreme majority of white people in the town, and said, “Really, what are you hoping to prove?” He explained that issues such as slavery would not have changed if they had been left to majority vote of the people, and ended with, “You are our leaders representing us, and it is the responsibility of our leaders to balance the passions of the majority against the rights of the minority” (Greenfield Recorder, February 2017). A large group of regionalists were at the meeting. After the Montague select board voted to approve the referendum, they became agitated when the select board chair declined to engage in any further discussion (Montague Selectboard meeting video, February 2017). Tammy later referred to them as “adult bullies” on the “Save” Facebook page.

The February 14 school committee meeting was held in the secondary school auditorium and drew a large crowd. People spoke in favor of both sides, and presented the same types of arguments as in all prior meetings. At this meeting, the superintendent finally
presented his personal position that the Indians mascot should change. He read a letter that
he also posted on the district’s Facebook page. I present it here in full:

Before I share my thoughts about the logo/nickname situation I would like to thank
the school committee for having the courage to address this issue, knowing in
advance that it would be controversial. The integrity and earnestness with which you
have undertaken this process is admirable and I am proud to serve you. It also needs
to be said that given your knowledge of the district’s communities combined with
the scores of hours you have put into listening to citizens and scholars and studying
this matter, no one is better equipped and poised to make decisions about it than you
are.

In terms of sharing my perspective on the “TFHS Indians”, I would start by
saying there is no doubt that the “Indian” is a symbol of tradition and pride to many,
if not most, of the adult members of the district’s communities and we now know
that most of our students feel similarly. We also know that those who support the
“Indian” have no ill intent towards Native Americans. But, because they bear no ill
will, many supporters of the nickname and logo, particularly students, continue to
ask “where is the harm in it?”

As the district’s educational leader I believe we need to help our students
understand that there is harm in the status quo. On average, each year, three of our
students are Native American and these students deserve and are afforded the same
civil rights protections enjoyed by all students. According to our policies, these rights
include learning in an environment free from conduct, symbols, and language that
create a hostile, humiliating, intimidating, or offensive educational environment.

Over the last several months we have heard from over 50 area Native
Americans, both at forums and in writing, who find the “Indian” to be offensive,
humiliating, and harmful. These sentiments have been the clear consensus view of
the Native American community in our region. We have also learned that
organizations with expertise in the social sciences have condemned the use of Indian
mascots as harmful and/or in violation of students’ civil rights. These include the
American Psychological Association, the American Anthropological Association, the
American Sociological Association, as well as the U.S. Commission on Civil Rights,
the National Association for the Advancement of Colored People, the National

Our review process has shown that there is widespread interest in having
students learn more about local history and Native American cultures. This is
commendable and will be acted upon. But this will not be enough. Our review
process has also revealed that Native American mascots have helped legitimize and
perpetuate harmful racial stereotypes and that these symbols exist within a context of
historical oppression against indigenous people, including an act of tragic violence
that occurred right in this community, only to be followed by centuries of ongoing
assault, subjugation, and dispossession. Understood in this context it is logical to see
the injustice of appropriating a name and culture that is not ours to take and shape as
we please. Indians are not like cowboys or Vikings. They are cultures of real people,
our neighbors, and it is inappropriate to treat them or any racial, ethnic, religious, or
gender group in ways that perpetuate and legitimize stereotypes.

Part of the mission of all public schools is to teach students to think critically
and to equip them to live in a multi-ethnic and complex world, which includes learning to recognize and dispel prejudices and stereotypes. Our review process has made clear we have much work to do to advance all facets of students’ multicultural learning; from thinking critically about history, to learning to see events from multiple perspectives, to understanding the nature of prejudice, discrimination, and oppression.

Many of our students have difficulty understanding this perspective and instead fall back on their honestly held belief that where no offense is intended, no problem exists. We have an obligation, as a public school system, to help our students grow beyond this line of reasoning, an aspiration clearly advanced by the district’s core values of empathy and continuous learning and it core belief that public education is the primary means we have for cultivating democracy and achieving social justice.”

In my opinion there is no way to retain the name “Indians” that would not continue to present a civil rights problem, a pedagogical mixed message, and a misalignment with our mission and core values. That we did not understand these things in the past need not be anyone’s fault, but if we do not act upon what we understand now it will be a lost opportunity to be our best selves. (SC minutes, February 2017)

In this statement, he affirmed the school committee’s position as decision-makers, and commended their engagement in the learning process. He acknowledged the localist perspective as one rooted in respect and pride. He then outlined the argument about why Native American-themed mascots are harmful, not only to Indigenous people, but to whole communities. He reiterated the imperative for instruction and learning about multiculturalism and social justice, and framed this as a key responsibility of educational institutions. He aligned his perspective with the GMRSD’s stated core organizational values.

As the district’s top leader, his perspective carried a lot of weight among decision-makers.

A few school committee members spoke at length about how divisive the process had been, and what they had learned. The chair said he was opposed to cutting the process short, and that through the inquiry events they had already established a “high bar” for any cultural references that would be appropriate for a mascot if the next step were to develop criteria as planned. He said, “I heard that there was some room for collaboration. I think that the committee deserves the chance for us to live up to our faith in them,” and that
changing the process “runs the risk of alienating a significant portion of our community” (SC meeting video, February 2017). Through this statement, he was expressing his perspective that the process should take priority, and that he continued to trust that stakeholders would come to a final decision that would be in line with organizational values.

After these statements, a school committee member made a motion to remove the Indians mascot and resume the process to select a new one. Another seconded it. They voted six to three in favor of the motion, and received a standing ovation from many in the audience, with the rest sitting silently in their seats. The chair voted against it, citing his opposition to changing the process, not that he was necessarily in favor of keeping the mascot. Another agreed with him. The third member who had voted against it said that they should wait for the results of the town referendum. The school committee then put a pause on the process, and decided to resume again with step two at the end of March (SC minutes, February 2017).

Tension did not disperse, however, due to the surprise of the early vote, and the divided condition of the community when it occurred. TFHS students staged a school walkout during which they walked from the school to the superintendent’s office to express their disapproval of the decision (Greenfield Recorder, February 2017). The student representative reported to the school committee that the students had planned a whole-school survey on the mascot for the day following the vote, and they were upset because they felt their voices had not been heard. He submitted the results of the survey anyway, which showed strong student support for the Indians (SC minutes, February 2017). Stakeholders on both sides appeared at this meeting to express appreciation for the decision to change, or to criticize the school committee and administrators for how they handled the decision-making process and/or the student walkout. Marisa submitted a letter that the
school committee reviewed in executive session that accused them of unethical behavior related to the mascot process (SC minutes, February 2017).

**Other school committee business.** Despite overwhelming attention to the mascot issues, district administrators began working in earnest on developing the 2017-18 budget during this time period. The superintendent created detailed drafts, and provided extensive descriptions to the school committee about the rationale behind each decision and how it might affect student learning. Some of these choices garnered a lot of community attention, and others seemingly none at all. The chair explained to me that the school committee trusted his judgment, although they asked a lot of questions, and that he always does a great job describing the program that is embedded in the budget numbers in ways that make sense to them (interview, March 2018). Due to the superintendent’s work to engage in collaborative budgeting meetings with town representatives, he was able to ask for an increased tax assessment, which they approved (SC minutes, May 2017). He also said that they heard from the town that their tax assessment may change due to changes with local utilities companies that owned property in the town, which would mean greater resource problems for the district.

Based on school committee minutes, the superintendent and three school committee members met with the Montague police department during this time to explore hiring a school resource officer, and to find a grant to pay for the position. The superintendent reported on progress related to his goals. This included mixed progress on elementary student reading, feedback from a review team that elementary teaching continued to be too teacher-directed and did not provide opportunities for students to think critically, teacher collaboration teams, community outreach efforts, and political actions he was taking to support increased public education funding from the state. He reported on administrative
team training “on understanding multicultural and social justice issues in schools” provided by the National Conference for Community and Justice (NCCJ), an organization that “promotes inclusion and acceptance by providing education and advocacy while building communities that are respectful and just for all.” He reported on teacher and administrator involvement in a Literacy Academy at which they were learning strategies to provide effective reading and writing instruction.

The director of business and operations reported on her efforts with the town of Gill to obtain state funding to replace the roof of the elementary school. Their proposal to the state was eventually not selected, as there were several other schools in the state that had older roofs in worse states of repair that were prioritized in the funding process. She spent time cleaning up different accounts, and discovered leftover money from prior graduated classes, plus deficits in different grant accounts that had occurred because they had been organized in a haphazard way. She told the school committee that the scholarship account was in arrears because they had awarded too many scholarships in the prior year by mistake. Her office updated the student activities account manual. The director of pupil services created a special education policies and procedures manual in preparation for an upcoming state review.

The school committee engaged in policy work. They formed a policy subcommittee that reviewed existing policies and gave recommended edits. They also voted to participate in the state Interdistrict School Choice Program in 2017-18. As a reminder, this allows them to accept students from other towns in exchange for a small $5,000 tuition payment. This is perceived as a forced choice by many organizational leaders, as any student can elect to enroll in another district even if their district does not participate in accepting students (e.g.,
interview, November 2016). This is one example of the lack of control school committees have in the current, centrally-controlled policy environment (Kirst, 1994).

Organizational leaders also reported on program developments that were related to the strategic plan. The secondary principal proposed changes to the TFHS program of studies. In addition to continuing to list the Native American Studies course, she reported on plans to revamp the history curriculum to include “middle school units focusing on culture, environment, and archaeology, moving up to studies of the Early Colonial Period/‘Indian Wars’ in US History I, and a unit in US History II on present issues and progress in 21st century First Peoples’ culture.” She said, “This would be an intentionally integrated curriculum design to promote a view of native history as an essential component of American history” (SC minutes, February 2017). The food service coordinator reported on new equipment that had been funded through grants, and new menu items that included local produce and meat from small family farms. In late February, the superintendent announced that The Partnership had received another grant to support teacher and staff training in the secondary school. He said, “Participants will learn together how schools can play a larger role in mitigating the negative impacts of toxic stress and trauma on the learning and health outcomes for children and adolescents.”

During these winter months, load on the “garbage can” system continued to be heavy, which Cohen, et al. (1972) predict will result in fewer decisions being made through deliberative processes. This occurred due to the range of unsolved problems, and energy demands on organizational leaders who were required to continue to focus most of their attention on the mascot issue. Restricting decision access had resulted in personal stress and anxiety for school committee members, who responded by attempting to resolve the Indians mascot problem quickly by making a decision that had not been resolved in any way through
deliberation. The authors state that it is important to consider the behavioral and normative implications of making important decisions by flight or oversight, and that this could be a reason organizations do not solve problems by making decisions (p. 9). As a result of the problem not actually being “solved,” localists remained active in the system, and continued to use social and political strategies to focus attention on the Indians mascot.

March-June 2017

After the self-imposed waiting period, the school committee resumed their original process (develop criteria, and select a mascot). There was significant discussion and differences of opinion among members about whether or not the school committee should be making the decision about a new mascot. Many of them thought that the students should decide. Others felt it was a school committee decision. They wondered about how they would cultivate community buy-in for the process. The superintendent facilitated a working session regarding criteria, and started with a statement from the school committee’s goals that they had set in the fall: “We wish to use this occasion as an opportunity to engage in an inclusive, deliberative, and comprehensive process that will lead to the selection of a high school logo/nickname that best suits the aspirations and values of our school community today” (SC minutes, April 2017). Regionalists weighed in at school committee meetings about the criteria, saying it should avoid references to specific people, and be universally respectful. A former GMRSD history teacher set up a GoFundMe account to accept donations for costs associated with the mascot change, and they raised over $6,000 within a few weeks. An anonymous donor, through the Community Foundation of Western Massachusetts, awarded a $2,000 gift to the district for these purposes. These behaviors show that regionalists were not only attending to resource issues, they were attempting to solve them by means available to them.
Chris submitted a grievance against the school committee, claiming they had violated Open Meeting Law. Perhaps this was intended as a distraction, or to purposely put pressure on organizational leaders. After considering the issue, the school committee decided they had not violated the law, and wrote him a letter stating this decision (SC minutes, March 2017). He did not contest this decision. Other localists continued to ask pointed questions about how district funds had been used the mascot decision process. A localist spoke at a meeting about a bill that was in the state legislature, which sought to ban all Native American-themed school mascots. This person suggested the school committee wait for the results of this bill before making any decisions about the mascot. Again, this is evidence that localists were seeking alternate sources of decision-making authority to take away this access from organizational leaders.

The localists turned their attention to the May town elections, and actively backed candidates for school committee whom they perceived to be supportive of the Indians mascot. The “Save” Facebook page was used as a space for organizing these efforts. The referendum passed four-to-one in favor of keeping the Indians mascot, but the vote was likely skewed due to David’s and other’s political efforts to boycott the question. Two school committee members, including the chair, lost their seats to candidates backed by the localists (Greenfield Recorder, May 2017).

At the next school committee meeting, a community member read a long letter encouraging them not to change their decision about the Indians mascot based on the results of the referendum. He said in part,

[...] the recent non-binding vote has cast Montague and the GMRSD in a rather unfavorable light. Among the negatives is the impression that Montague and its schools are behind the times, stuck in an outdated social reality and unwelcoming to new people or outsiders. This unfavorable view will result in parents choosing to not send their children to our schools, or in people choosing to not move here. Indeed, in the case of my own grandchildren, whom we had hoped would be able to attend
school in town; the recent election has caused a great deal of concern about a school environment that seems to embrace an ignorant racial stereotype. Will the attitude extend to other groups? To Latin American immigrants, Muslims, Farmers Children? (SC minutes, May 2017)

This statement aligns with Jen’s earlier concerns that the Indians mascot presented an image problem for the district, and was likely driving away families and funders. From their perspective, widespread community support for what many considered a racist symbol implied that the community as a whole was intolerant and exclusive.

In addition to school committee changes based on election results, a school committee member vacated her seat, and they initiated a process to replace her. Two candidates emerged: the now-former chair who had just lost his seat, and the former school committee member who had been at the center of relational problems among the committee as described in Chapter 4. The committee voted to select the former chair, who thus resumed his place on the committee (although not as chair). With two new members in place, the school committee voted to accept the following criteria for a new mascot:

COMMUNITY RELEVANCE: It should be representative of the GMRSD community and/or the environment.

MARKETABILITY: It should be easily identifiable and easy to relate to; The school colors will remain blue and white

INCLUSIVITY: It should be non-gender specific and appropriate for all activities, projecting a positive image; It should not reflect, represent or be associated with a particular group based upon race, ethnicity, or culture; It should be void of any cultural appropriation

VALUES: It should reflect or symbolize one or more of the qualities of integrity, persistence, dignity, strength, honor, and pride (SC minutes, May 2017)

The values category is interesting in that it combines two of the district’s core values (integrity and persistence) with the Indians mascot tagline values (dignity, strength, honor, and pride). The school committee created another working session to discuss the process to select a new mascot, which involved significant discussion about whether or not they should
be making this decision. They voted at the end of June to create a task force comprised of a range of stakeholders (school committee members, students, parents, and community members), which would take on the new mascot proposal and decision process.\(^\text{12}\)

**Other school committee business.** Based on school committee meeting minutes, the budgeting process occupied much of the central office administrative team’s time, as well as the annual audit. Financial information about capital improvement projects came in, and costs related to interest rates and construction were higher than they had projected. They discovered that the district had been billing incorrectly for Medicaid reimbursements for several years, and owed hundreds of thousands of dollars in back payments. This forced a spending freeze, and adjustments in budget planning. The superintendent recommended staffing cuts, including the literacy coach at Sheffield ES, but also increased special education staffing at Hillcrest ES citing projected student need in the coming year. He announced that spending on “out of district placements” (i.e., students enroll in specialized schools at the district’s expense based on intense special education needs) would be increasing due to some students who were moving into the district. At the end of the year, he announced that the director of teaching and learning had resigned, and that he would be eliminating her position and distributing the responsibilities to other members of the administrative team.

Based on anticipated cost increases, the superintendent made a controversial recommendation to combine grades five and six at Gill Elementary based on anticipated enrollment of “7 or 8 students” in grade six, and a current grade five class size of 16. He said, “Combining these students into one classroom will provide the sixth graders with a viable class environment and result in a maximum class size of 24, perhaps fewer.” This

\(^{12}\) The mascot task force finally selected a new mascot—the “Thunder”—in late May 2018.
prompted community protests, which represented the only other example of stakeholder participation in the system during the 2016-17 school year aside from the mascot issue.

This was a small “garbage can” that opened around this issue, and quickly closed. It attracted a different set of participants, and was not attended to by localists or regionalists. Five parents appeared at a school committee meeting to advocate against the recommendation, citing negative effects to student MCAS scores, an anticipated disruptive classroom environment based on existing student behavior issues, and the fact that they would lose a teacher they perceived to be high quality. The superintendent rescinded the recommendation after learning that three students who had originally said they would be enrolling in grade six at GFMS had changed their minds and planned to stay at Gill ES. These intradistrict choice enrollment decisions (i.e., grade 6 students at Gill ES have a choice of where to enroll) have no financial effect on the overall district budget, but the decisions of these three families made it such that combining grades was no longer a viable option. This process represented increased load on organizational leaders, who were continuing to attend to the larger decision-making system that included the mascot issue.

Also during this time period, the superintendent provided updates about ongoing programs. They had received a grant to work on hands-on science curriculum with the Four Rivers Charter Public School through collaborative training at a local university, and were beginning to engage in this work. He described administrative preparations for the upcoming DESE Coordinated Program Review. He reached out to parents for feedback about his bi-weekly radio spots to assess whether or not this had been a good use of district funds. In a later interview, he said he did not receive any feedback about this topic (interview, March 2018). Other collected data showed that stakeholders were not attending to the science curriculum work, nor to the state site visit.
This is further evidence of the singular participant attention on limited elements; however, at June meetings, a few stakeholders called attention to bullying problems in the district. Tammy appeared to advocate for the district hiring a school resource officer, citing bullying and student safety (SC minutes, June 2017). She claimed this was a primary reason people choice out of the district. Two other community members, representing a local group called Franklin County Against Bullying, spoke to the committee about perceived bullying problems in the schools. They said they “have heard from a lot of parents showing their frustration with the district due to the fact that they feel not enough is being done about bullying,” and one claimed that she had removed her own child from GFMS due to bullying issues (SC minutes, June 2017). They offered support for this issue through their organization.

Institutional pressures were on display at school committee meetings. The superintendent reviewed changes to state law that were based on the new federal reauthorization of the public education law, the Every Student Succeeds Act, and provided highlights:

There will be increased focus on supporting student performance in literacy at the earliest grades, mathematics at the middle school level, and enhanced early college and career-technical education at the high school level.

Additional attention will be paid to supporting districts and schools performing in the lowest 5 to 10% range in the state accountability system, through the application of a range of turnaround strategies.

More resources will be directed towards promoting student social and emotional learning.

Additional accountability measures beyond MCAS scores and high school graduation rates will become part of an enhanced school report card and accountability system. (SC minutes, May 2017)
These federal requirements show continued institutional pressure on accountability regarding student academic achievement and attainment, and new pressures related to supporting students’ social and emotional health.

Sheffield ES hosted a voluntary Turnaround Site Visit from an assessment group subcontracted by DESE as part of their “Level 3” improvement plan. This group found that while improvements had been made, elementary teaching did not provide opportunities for students to think critically. The superintendent remarked at a school committee meeting, “Their findings confirmed much of what we recognize as highest priority work at the school and we look forward to using their data and observations to inform our improvement initiatives” (SC minutes, May 2017). Principals reported on progress on their School Improvement Plans, which focused on strategic plan initiatives related to student social and emotional learning, student literacy and/or critical thinking development, and community engagement. All of these initiatives show that the GMRSD was actively engaged in aligning its technical work to state and federal expectations.

During this period, the superintendent started the planning process for developing a new district strategic plan to replace the current one that was ending. His process focused on data and community input, and areas of exploration included: student academic performance, attendance, drop-out rates, “churn” rates, and discipline; profile and analysis of who attends GMRSD, who does not, and why; programs, offerings, and cultural differences provided by competitor schools; student, staff, and faculty feedback about school/district strengths and challenges; expenditure and revenue analyses relative to similar districts and state averages; community wants and needs. He suggested hiring an outside mediator to facilitate a collaborative discussion between the district and town governments about long-
term fiscal challenges. They did not make any decisions related to this plan by the end of the 2016-17 school year.

**System Activity Summary**

The activity within the GMRSD decision-making system adheres to the garbage can model described by Cohen et al. (1972). While there was significant work being done, the system generated decisions that were largely based on what they term “flight” and “oversight” processes as opposed to coming to resolution on problems with conflicting perspectives. Oversight processes are characterized as decisions that are made quickly before problems become attached. This occurred in many of the routine decisions around policy adjustments, hiring, school committee role assignments, and contracted services. Flight processes are characterized as those in which decisions are made when problems are not attached to them. This occurred primarily with regard to anything related to teaching and learning. There were problematic aspects of their academic programs, as well as student “readiness to learn” brought on by disruptive student behavior, but the school committee did not intervene in any decisions the superintendent or administrative team made in these areas. I discuss the superintendent’s role in these decisions in Chapter 6; however, the fact that many choices were not actively attached to these problems indicates that participant attention among decision-makers was directed elsewhere. Budgeting and resource allocation (e.g., capital improvements) was an area of some deliberation among organizational leaders, and these deliberations were productive based on the unified approach that organizational leaders had developed. Again, trust in the superintendent’s judgment played a key role, and I discuss this in Chapter 6.

The system was clearly under intense load due to extreme participation attention to the mascot element. Cohen, et al. (1972) claim that garbage can systems are sensitive to load,
and that this results in fewer deliberative decisions. This load was typified by competing perspectives on problems and solutions, and likely exacerbated by the school committee’s decision to limit decision access in regarding the most energy-intensive element (the mascot) to themselves.

Below, I discuss social and political dynamics in the GMRSD system, and explore how these contributed to system load. I begin by defining three distinct cultures in the system, each with its own values and assumptions about “right” action regarding the mascot issue. I then explore political strategies that localist and regionalist groups used to further their objectives. I end the chapter with evidence of participant learning, which was the purpose of the school committee’s process, and how this learning influenced the decision to remove the Indians mascot and select a new one.

**Culture Clashes: Competing Ideas About “The Right Thing to Do”**

Based on the descriptions and perspectives above, there were three basic cultures that were actively participating at the organization level within the GMRSD during the 2016-17 school year: organizational leaders, localists, and regionalists. These groups were operating under different sets of shared assumptions about what it meant to do the right thing when making decisions about the schools and district. One school committee member said to me that she had to remind a localist, “When you’re talking about YOUR community, you’re not talking about THE community” (interview, April 2018).

Culture is comprised of the shared norms, values, and assumptions of individual participants, and plays an important role in how people interpret events and actions, and make sense of them (Schein, 1996, 2010; Tierney, 1988). A basic framework for organizational culture includes: artifacts, or visible products, activities, processes, language, rituals; espoused values, or articulated beliefs about what is “right” or “good;” and
underlying assumptions, or tacit beliefs that determine behaviors, perceptions, and emotions (Eckel, Green, Hill, & Mallon, 1999; Schein, 2010). Culture can be difficult to discern and describe, especially for individuals who are in the middle of it; however, it is critically important to identify aspects of an organization’s overall culture and subcultures when engaged in a change process. I describe each of these three distinct subcultures of the GMRSD in this section by synthesizing findings that I have presented in other sections and chapters, and connect these to each group’s conception of “the right thing to do.”

**Organizational Leader Culture**

Most of what I learned about organizational leader culture surfaced through their rituals of school committee meetings and events, and artifacts such as their strategic plan. They sat around their ring of tables in the high school video classroom with their name plates and microphones. They sat at tables set up in front of the first row of seats in the high school auditorium scribbling on notebooks during inquiry events and forums. They were all white, and all lived in Gill or Montague. They were elected by voters. They were the keepers and enforcers of district policy, and sometimes were able to set these policies. They were rule-followers, beholden to adhere to state laws and regulations, as well as their own local ones. The school committee chair told me that, although he did not agree with all of the policies, he appreciated the structure and clarity they provided. He said,

> [...] once you know what the rules are, then you can do something. These are the rules. I mean, yeah, it’s stupid, I don’t know if you watch football, but they change the rules all the time [...] but if it’s about winning the game, and I use that in very general terms, then let’s just look at the rules, and figure out a plan, and do what we can do. There’s no point in crying about the rules, or saying, ‘We have to change the rules.’ OK, great, let’s work on trying to change the rules. It’s Massachusetts, what do you think is gonna happen? And when do you think it’s gonna happen? How ‘bout we work on us? And we look at our situation, and see how we can make us better. Period. (interview, November 2016)
Due to their history of poor relationships, and direct involvement in divisive community issues such as the Montague Center School closing, school committee members worked hard to be consistent and transparent about their work. Changing the timing and purpose of the decision process when they voted to remove the Indians mascot mid-year represented such a cultural disconnect for two of the members that they voted against it (effectively supporting the Indians mascot by implication). They also focused on ensuring opportunities for community engagement and voice through the meetings and public events, and the district’s Facebook page, as well as consistently reminding community members that they wanted to hear from them through email or in person. These were invitations to participate in their decision-making system, but they went unheeded except around the mascot issue.

The superintendent was a key figure in this culture. He helped to create espoused values and beliefs through the “Building Bridges to Success” guiding document, and to embed them in the district’s strategic plan. He ensured these values were enacted by referencing them frequently in terms of his own work, and treating plans as living documents that guide their work. School committee members referenced and enacted these values frequently during the mascot consideration process, especially empathy and continuous learning. The process itself was designed around their core value of continuous learning, even as they lamented their perception that many people did not seem to be open to learning. They sought to maintain integrity by projecting a neutral stance on the mascot, and by remaining open to learning about the topic.

The superintendent had strong beliefs in social justice and active citizenship, terms that were sprinkled throughout their guiding documents and his reports to the school committee. He hired an administrative team who also espoused these beliefs, and saw them
as central in their work to support students. As a unit, the organizational leader group held underlying assumptions that public schools are responsible to create and maintain inclusive environments that support all students, not some students. They also had an underlying assumption about the purpose of schools as sites of learning—for students as well as educators, leaders, parents, and other members of the community. For organizational leaders, the right thing to do was to create opportunities for community voice in order to build knowledge, and then to make decisions that were supportive of all students.

**Localist Culture**

The localists’ conception of the GMRSD community was highly localized and exclusive. It centered around connections to the athletics program, and an obvious artifact was the Indians mascot. I picture it on sweatshirts at football games, which are community rituals that celebrate the dignity, strength, honor, and pride of the Indians, the athletes, and themselves by association. I picture it on a sea of royal blue T-shirts in the high school auditorium during the forums after Chris arranged to have them printed and distributed to supporters (Save the TF Indians Logo Facebook page, October 2016). I picture it on lawn signs in support of voting “yes” on the Montague town referendum, which key localists arranged (Save the TF Indians Logo Facebook page, April-May 2017). This culture was about traditions and history associated with athletics, which were displayed in gestures such as the Tomahawk Chop and war chant, victory parades through the towns, bonfires, and pep rallies. They “bleed blue” over generations of family members who attend the GMRSD schools, and whose children attend the schools. Their perspective was focused on the towns, the schools, the playing fields, and widened to encompass rival teams and away games.

Aside from athletics events, localists gathered virtually on the “Save the TF Indians Logo” Facebook page, and in spaces around town that were associated with individuals who
support the Indians mascot (e.g., Hubies’ Tavern, and the sports bar Between the Uprights, both of which were owned by outspoken localists). They referred to themselves as “taxpayers,” “residents,” “property owners,” “voters,” and “citizens” to denote their connection to the towns, and role in electing the school committee. Their assumption was that if one was not in support of the Indians mascot, that implied a lack of support for the schools. An unquestioned belief was that the Indians logo is about honor and respect because that was their intent. They truly believe they are not racists. They displayed support for Native Americans in their insistence on teaching their history and culture in the schools. They assume that the goal of a democratic system is to enact the will of the majority. For localists, the right thing to do was to define the Indians mascot as respectful, and support it as a symbol that honors the schools as well as Native American history and culture.

**Regionalist Culture**

Regionalist culture had a wider perspective than localist culture. They saw the Indians mascot as a problematic artifact of public schools in general due to a belief that it represented a racist stereotype that reinforced structural oppression and inequality in society as a whole. Those who were directly connected to the schools had pride in them, and wanted others to look favorably on the schools and their community. The main difference between them and the localists was that they did not personally identify with the Indians mascot. Instead, they spoke frequently of their connections to people, places, and activities in the GMRSD community in ways that were disconnected to this symbol. Some of them actively attempted to disconnect these connections from the symbol. For example, one frequent commenter on the “TF Alumni Who Think a New Mascot Would Be Fine” Facebook page wrote,

I think both sides talk of honor and pride, ....My pride as an alumni is for the TFHS education that I received as a 1969 graduate that led me to college and a great career.
in early education. I have pride in the spirit of our students, great sports teams, and how our town supports the school. I am not proud that we used headdresses and Indian symbols…

Regionalists valued inclusivity and diversity of perspectives. For example, the first post on the “Alumni” Facebook page illustrated the value of inclusivity by listing potential reasons for supporting the selection of a new mascot. It read:

This group is for Turners Falls H.S. Alums who would be totally fine with a new mascot being chosen for your alma mater. Your reason(s) for supporting that change can be whatever you please! Some examples include:

your perceived high school experience and subsequent identity do not hinge upon a consistent mascot

American Indians have been asking sports teams to stop using them as mascots for years, so maybe we should honor that

it's just a mascot

you have an idea for an EVEN BETTER MASCOT. what is it? share it!

you're generally neutral about the whole thing but if some people are offended by it then why not change it and then move on to more important issues like student and teacher retention rates and is the killer clown still stalking the halls of Sheffield Elementary?

And many more!

Feel free to share your reasons as well as supporting articles or evidence for why this could maybe be a good thing for Turners Falls High School!

Despite a belief in inclusivity, they rejected the idea that the Indians mascot was respectful, which excluded the localist perspective. They believed that Native American voices should be prioritized in the Indians mascot decision, yet they disregarded Native Americans who were in favor of such symbols. This included all of Chris’ suggested speakers, as well as localists who claimed Native ancestry. In contrast, they prioritized the perspective of those who claimed Indigenous roots and had direct connections to the cultural “community” of tribes, as opposed to those who simply claimed ancestry. They regularly referenced “dialogue” as a key strategy, as well as “compromise,” but these were often under the
assumption that once people engaged in dialogue and built understanding about why the Indians mascot was a racist stereotype, they would change their minds and be in favor of a change. Similarly, localists believed that if only people could understand that the Indians mascot was about respecting and honoring Native Americans, they would be in favor of keeping it.

Regionalists were committed to social justice and were open to continuous learning about the effects of structural oppression and racism in society, even if their current understanding was limited. Some spoke about their own racism, and their work to be allies to people of color. Those who are people of color used their personal experiences to illustrate the subtle effects of racism in society. They valued democratic processes, but recognized that protecting the rights of oppressed minority groups took precedence over the will of the majority. Regionalists’ basic underlying assumption was that communities are diverse, and they should support all members as opposed to a select group. For regionalists, the right thing to do was to define the Indians mascot as racist, and select a new identity marker for the schools that supported and respected everyone.

Culture Clashes

These three cultures had competing perspectives and beliefs that eventually prevented them from finding common ground. This resulted in an organizational decision to change a key identity marker of the school district without buy-in from a majority stakeholder group. As a result, the mascot element did not exit the system, and continued to place load on participant activity and capacity. In the next section, I describe political dynamics that influenced the interrelationships among these groups and other system elements.
Political Dynamics in the System

Thus far, I have outlined the decisions that came out of the GMRSD system in 2016-17, described the basic timing of activities in that system, and various perspectives and interpretations of these activities. Power and politics influence decision-making within organizational systems, including access to decisions, and controlling participant attention (Cohen, et al., 1972). Power indicates the ability to have things done the way one wants them to be done (Salancik & Pfeffer, 1996); therefore, I also examine the relative success of these various strategies on decisions produced. Decision-making strategies are part of organizational culture, as well as subcultures within the organization (Tierney, 1988). I relate various strategies to organizational leader, localist, and regionalist subcultures.

Cultivating Allies

Both localists and regionalists sought to identify and build relationships with allies who could help them in their political work. Both groups created Facebook pages that served as sites of information sharing, and organizing. These pages also served to identify like-minded others who agreed with their political stance. The primary regionalist page was called “TF Alumni Who Think a New Mascot Would Be Fine.” It included more than alumni, although this was the primary audience. A few GMRSD teachers were members of this group. The manager stated, “This is not intended to change the minds of people who feel strongly about keeping the mascot/logo, but it may be helpful to those who are truly neutral or those who want to engage in dialogue with others about why it should be changed.” The primary localist page was called “Save the TF Indians Logo.” It also included many alumni and current parents. These pages, as well as the GMRSD Facebook page, attracted other allies from around the state, and even from around the country.
For the regionalists, national-level allies included a woman named Donna Fann Boyle, who was a Pennsylvania-based Indigenous rights activist who contributed to the “Alumni” Facebook page, and engaged in extensive commenting on the GMRSD Facebook page. It was not clear how she became involved, although from her posts it appeared that she was engaged in this type of activism wherever it surfaced around the country. Since this was such a public issue, and regularly appeared in the news, she could easily have found the GMRSD on her own. The regionalists were also associated with a Twitter group that used the topic category “#notyourmascot.” The “Alumni” Facebook page often had shared posts associated with this group. Rhonda appeared at the September 27 school committee meeting with a T-shirt that contained this slogan. This connection was exploited by the localist side, and used as evidence that TFHS was being targeted by a national movement of people who sought to remove all Native American-themed mascots.

On the localist side, Chris actively engaged in finding Native American scholars and activists who espoused a pro-Native American mascot perspective, and cultivated personal relationships with them. This included Andre Billeaudeaux, a public figure who speaks and publishes on the politics of Native American name-change campaigns, and Eunice Davidson, Dakota Sioux member and prominent member of a group called Native American Guardians Association (NAGA), which, according to their Facebook page, is a group dedicated to “protecting positive Native American cultural imagery, logos, and icons in the mainstream.” Chris repeatedly suggested these individuals as speakers for the inquiry events. He also cultivated a relationship with two radio personalities who ran “The Beating Drum Radio Show” which is described on their Facebook page as “the premier Native American radio show in America that is preserving positive Native American imagery in sports and mainstream.” He regularly called into the show, and encouraged others to do so.
as well. At one point, he invited Rhonda on Facebook to call into the show (“Your chance to hear a different point of view and if you dare- call in and talk with Rocky”). The hosts of this show commented on the “Save” Facebook page, and made lawn signs with their logo for the Montague town referendum. They also posted about the TFHS conflict on their website (e.g., “This week we have guest’s from Turner Falls MA on the show. Their name and symbol are under attack by the Not your mascot people.”)

In contrast to the localists’ efforts to cultivate national-level alliances, regionalists were connected to local Indigenous groups, most prominently the Nolumbeka Project, which operated out of Greenfield, and whose president and a board member were two of the residents who originally approached the school committee to discuss the issue. Regionalists also paid attention to current national issues involving Indigenous groups such as the Dakota Access Pipeline (DAPL) protests that were happening in Standing Rock during this time period. They challenged localists’ claims that they were supportive of Native Americans when they talked about teaching history in the context of the Colonial Era, but neglected to see the connection to modern political events. For example, a post on the “Alumni” Facebook page stated,

I saw a number of people commenting on the “silly” DAPL protest in town today and how those were the “same people trying to get rid of our mascot”. It's crazy how they don't see the irony - that honoring and respecting Native people includes fighting for their rights in the present day...

A school committee forum presenter who identified as Native American stated,

Native people and native cultures still exist in this country. Granted, our population is small, but we are here. By appropriating our names for your own, you are helping to minimalize the fact that we are a living, growing, and active culture. If you honor us, learn about our traditions, our way of life. People often only speak about us only in the past, and they don’t realize that we are still here. (forum, October 2016)

To honor the local perspective, organizational leaders intentionally sought local representatives of Indigenous groups as presenters in the inquiry events, and avoided
contacting those from other areas of the country. This enraged Chris and other localists who accused them of treating Native Americans as one-dimensional, which they claimed was inherently racist and discriminatory.

Including and Excluding

As explained above, localist and regionalist cultures were exclusive, although to different degrees and in different ways. Language served to include and exclude individuals in these social groups in the GMRSD system. Localists often used words and phrases that identified their local status such as “alumni,” “resident,” and “property owner,” and regionalists began using these terms as well in response to many localists referring to anyone who was opposed to the Indians mascot as “outsiders” to signal that they did not have the right to make claims or decisions about GMRSD business.

For example, they consistently noted that Rhonda and other active regionalists did not live in one of the GMRSD towns. The fact that Rhonda had attended TFHS was irrelevant from their standpoint, as she clearly did not embrace the dominant culture of the school. A school committee member who had grown up in a neighboring town said she was approached by her eighth grade teacher at an unrelated event in another town. She said, “He verbally accosted me, using the F-word, that I’m an effin’ outsider, who the ef do I think I am being on the school committee, I’m not from here...and on and on and on” (interview, April 2018). A white woman spoke to the school committee at one of their meetings, and suggested that that people who were speaking out against the Indians mascot were attempting to be “allies” to Native Americans, as opposed to “outsiders” (she used air quotes to emphasize this word) as they had been perceived and characterized by many. She said that she had purposefully chosen to live in the community, and that “people who live here should be proud that people are purposefully choosing to live here.” Her implication
was that residents in support of changing the mascot were being purposefully excluded from the community, and that this created an unwelcoming environment (SC minutes and video, January 2017).

Regionalists were often referred to by localists as being “politically correct” or “PC,” which was synonymous with being politically liberal from a conservative perspective (i.e., an insult). Sometimes certain words were interpreted in different ways depending on the context. For example, the word “townie” was used by localists to signify one’s history and connectedness in the towns, but also used as a disparaging stereotype to indicate ignorance or uncouthness. While language that defined “us” and “them” could be useful for political purposes, it did not facilitate dialogue or learning. The school committee chair remarked to me, “Once you start labeling the conversation is over” (interview, March 2018).

Prioritizing (Some) Native American Voices

All groups, including organizational leaders, claimed that Native American voices were primary in the discussion of the Indians mascot, however, localists excluded local Native American groups and representatives who were opposed to the Indians mascot by ignoring them, or by focusing their attention on national-level allies who were supportive of their perspective that the Indians mascot was a symbol of respect and acknowledgement. Rhonda made her identity as a member of the Inupiaq and Athabasca tribes a central part of her statements, and she often gave an introductory greeting in an Indigenous language. She said at the first school committee forum, “I’m an activist because I was born Native American” (forum, October 2016). These two identities were intertwined for her, yet she was not accepted as a legitimate Native American voice by localists. On the “Save” Facebook page, Chris referred to regionalists as the “Not Your Mascot folks” due to Rhonda’s connection with this national movement. He referred to them as “haters” and
“racist” for not agreeing with his Native American allies. A couple who spoke at one of the school committee forums and identified themselves as Native American said, “You say that this team name is an honor. We tell you that we do not like it, and yet you insist that your way is correct, and that we are wrong. This is the very essence of a lack of respect” (forum, October 2016). Other speakers at the forums qualified the difference between being part of the cultural “community” of an Indigenous group, versus simply claiming ancestry. This was in response to the large number of localists who claimed Native American ancestry, but had not indicated connections to an Indigenous community.

All of the local Indigenous groups and representatives were opposed to the Indians mascot, and localists needed to look further afield to find any that were in favor. They claimed that they honored these voices, but their actions said otherwise when they did not accept the local point of view. For example, Jeff had been in the audience at the school committee’s inquiry event focused on social justice. He questioned the findings of a study that the speaker had cited that claimed the Native American stereotypes were harmful to Indigenous groups even if they accepted them. Jeff handed her a copy of another study that contradicted her claim, and told her that he had been reaching out to various local Native American groups without success. He said, “What happens if the tribes around here refuse to collaborate with us unless we get rid of the mascot, totally?” The professor, who had responded at length to every other comment and question from the audience during the event, stated simply, “Well, that’s an issue” (inquiry event, November 2016)

**Silencing**

Social inclusion and exclusion had the effect of creating hostility and division within the community, and personally exposed those who spoke out to negative social pressure. Most of the loud voices expressed localist views, and most of the criticism and hostility was
aimed at regionalists. For example, there were claims of death threats in the community that were reported in the local paper and mentioned at a school committee meeting. They went unconfirmed, but a speaker at the first forum was booed when she said the Indians mascot was racist, and that she was glad she did not bring her daughter to the event because she had heard there were death threats (forum, October 2016). When Rhonda’s statement continued past the allotted three minutes at this same forum, members of the audience, most of whom were wearing blue T-shirts with the Indians logo, started to clap loudly in a slow rhythm (unlike applause), and continued to do so until she stopped talking. Interview participants told me that several of the school committee members felt personally attacked throughout the process, and that some of their children were being bullied by other students at school because of their parents’ assumed positions on the issue. One member said that people would make faces at her and her family, or point, or do the Tomahawk Chop while they were out in town or eating at restaurants. She also told me that school committee members “who grew up on The Hill” were being pressured by friends and family to espouse pro-Indians mascot views (interview, April 2018).

This social environment had the effect of silencing those who were not willing to expose themselves to personal attacks or conflict. For example, early in the year, a couple who attempted to engage in a respectful exchange about the mascot on the district’s Facebook page were attacked and belittled by commenters who expressed localist views. After this, they did not make any more comments, and did not speak at any school committee meeting or event. I reached out to one of them to request an interview for this research, and did not get a response. They had both been involved in local politics for over a decade, and public debate was standard behavior for them. Toward the end of the Facebook thread, one of them wrote,
We have received multiple private emails with harassment, name calling and insults, one including a former alum from the school district. I will remind you that the way we behave, is shaping lessons of learning for our children and build community (GMRSD Facebook page, September 2016)

The environment was so hostile that even those who were accustomed to public disagreement decided to leave the conversation. Silencing was an effective way for localists to remove many of the regionalist participants from the decision-making system, which prevented them from becoming attached to the perspective that the Indians mascot was a problem, and diverting attention (Cohen, et al., 1972).

Finding safe space to express one’s views became important, as well as knowing when not to speak if the goal was to avoid conflict. When I mentioned my perception that there was a lack of public voice in favor of changing the mascot to one interview participant, she confirmed that she had the same impression, and said she knew for a fact that these conversations were going on in private. I asked her why this pattern of silencing surfaced, and she explained,

I think that if you believe in changing the mascot, then you believe in nonviolence— I’m not kidding you—and the idea of peaceful conversation and debate, and perhaps they moved away from that because it was the opposite of what was happening. I mean clearly there were no physical fights, but there were such verbal attacks. It was horrible. (interview, April 2018)

Conflict around the mascot issue divided families and friends, and became a taboo topic of conversation in some settings. One exchange between two participants on the “Alumni” Facebook page illustrated this phenomenon:

[Participant 1] [name] how does this all play out in your extended family? Do you avoid talking mascot at christmastime? ;)

[Participant 2] The subject was off limits. It was added as an amendment to the ‘no politics on holidays’ clause.

[Participant 1] good call. ;)

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One participant told me that she and her husband were able to have productive conversations about the topic, but he was not able to discuss it at work because many of his colleagues did not share his perspective (interview, April 2018).

Finding safe space to talk about the mascot issue became important in the schools. The secondary principal told me that there were staff and faculty members on both sides whose views were known, and students would seek them out as supportive adults. She said this was especially important for students who were opposed to the Indians mascot and were not willing to expose themselves, as the vocal majority of students were in favor of keeping it (interview, April 2018). This was confirmed when the student representative provided student survey results to the school committee after the Valentine’s Day vote (SC minutes, February 2017). One parent said to me that her son had asked if he could participate in the student walkout the day after the school committee vote. She asked him if he wanted to do it because he believed in keeping the mascot, or if he was simply going along with what a lot of other students were doing. He said it was the latter (interview, March 2018). All of this shows that the pro-Indians mascot voice was loud and pervasive, but it did not have the effect of influencing the school committee’s decision.

**Timing of Engagement in the Mascot Issue**

The Indians mascot issue had been raised before, but had not been acted upon by prior school committees. The superintendent said to me that as a former history teacher who taught about social justice, that the problematic nature of the Indians mascot was apparent to him when he took the job in 2013; however, he decided not to address it at first, saying
that he did not know if it was important enough to address. He said that in the past they had
steered away from the issue and tried to do things like using the symbol less. He said it was a
“don’t ask don’t tell type of thing” (interview, March 2018). Although he was more
knowledgeable about the topic of social justice than many in the community, his perspective
that this was not a top priority was common, especially in the context of the district’s
persistent resource issues and struggles to meet state expectations.

One administrator thought the timing was problematic because of all the other issues
going on in the schools (interview, December 2016). Many school committee members told
me they had been extremely concerned about the divide this would cause in the community
before the process started (interviews April 2018). Considering the prior history of conflict
and community division surrounding the Montague Center School closure, and the risk of
family flight—especially if a large segment of the community were disappointed with the
outcome—this prospect weighed heavily on their minds.

I asked several organizational leaders, “Why now?” I also asked if they took on
the mascot issue intentionally or “just stumbled into it.” One said,

It was a stumble into it, for sure. And...I don’t think people really knew what they
were getting themselves into; however, I think that even though we didn’t find out
what [the superintendent’s] take on it was until the very last day, I think that the
school committee felt that they were supported enough by him that they could take
it on. (interview, April 2018)

Others, including the chair and the superintendent, confirmed that none of them truly
understood what they were getting into (interviews, March-April 2018). At the time, they had
interpreted it as an opportunity to be responsive to a request from the community, which
was one of their primary goals, not an intentional move toward making a change that they
assumed would have a specific outcome. They had a lot of problems to deal with, and
supporting schools and student learning is a labor-intensive job. The quote above about the
school committee feeling supported by the superintendent indicates that they had reached a level of stability that allowed them to make room for one more issue.

Based on the market theory of school improvement, it is logical to assume that part of changing the mascot could have been an effort to align the district with the wishes of target audiences. As described in Chapter 3, the GMRSD schools have an increasingly racially diverse student population. There is an ongoing assumption that highly educated and socially progressive parents tend to choice out, and that many of these families held regionalist perspectives. In a conversation in which we did not otherwise talk about the mascot issue, the superintendent said to me, unprompted, “Some folks might think that this whole mascot logo thing is also an attempt to broaden our reach of who feels comfortable here” (interview, December 2018). He did not elaborate further, and he turned our conversation back to our prior topic, but I wondered if this were an assumption that was circulating through the community. I also wondered in hindsight—after learning more about his commitment to social justice—if his statement implied that the intent was to create a more inclusive community for historically marginalized groups. Even if this were true, the evidence does not indicate that taking on the mascot issue was an intentional move among organizational leaders to accomplish anything other than to be responsive to the community regarding an issue that had been raised for years.

I asked other participants if changing the mascot was somehow directed toward a target audience that the district wanted to recruit. One, who preferred to remain anonymous on this point, said, “There was quiet conversation about that. [...] You just can’t really say that. You know? I mean you just can’t. You just can’t” (interview, April 2018). When I asked the secondary principal this question, she said, “I don’t think so because I think there’s enough of a case to be made that it’s pulling in the other direction,” meaning there was a
huge risk that the “Indians loyalists” would choose to leave (interview, April 2018). There were many comments on the GMRSD Facebook page that implied localists would consider this (e.g., “Seriously hoping my child will either spend her senior year at GCC [Greenfield Community College] through dual enrollment, or school choice to a less dysfunctional district”). The principal went on to say,

I think it’s too hard to know, so I think for…for the school committee members who have cast votes to change the mascot, my overriding sense is that they did that on the basis of...as an ethical decision. Right? Their evaluation of all of the evidence that was in front of them led them to decide on an ethical basis. (interview, April 2018)

In 2018-19, the percentage of boys enrolled in the ninth grade dropped precipitously. The secondary principal said she had no way to know, but wondered if that were evidence that boys chose to leave because they were not able to play sports for the Indians.

Decision Access

The fact that the school committee had restricted decision-making access to themselves shows that they had a high degree of power within the system (Salancik & Pfeffer, 1996). When they initially approached the school committee about the mascot, David had suggested they “spend a year of outreach and education on this subject within the school community, and the towns of Gill and Montague, and bring it to the town meetings for an advisory opinion next May – to report back to the school committee” (Montague Reporter, May 2016). Localists, from the beginning, assumed that the school committee had already made a decision, and were going through the motions of a process that was solely under their control in order to convince the community that their input was valuable.

I asked most of my interview participants who were organizational leaders at the time if this were the case. They universally claimed that, while they had assumed they knew how a few members of the school committee would vote, that they definitely did not think
the outcome that occurred was assured from the beginning. What they were all sure of was that this was intended to be a learning process, and they took that responsibility seriously. I describe learning that occurred in the system in the next section.

**Learning through the Process**

There are many words I heard growing up in Turners Falls. Seen as somehow less offensive than the traditional four-letter cuss words, words to describe the intellectually or developmentally disabled, gay people, and poor people, were thrown around like confetti. These words were often tolerated by the adults around us, in the school hallways, well into the 90s when I attended Turners Falls High School.

You remember. I am sure that many of you would be horrified if you heard your child call a friend the “f” or “r” word now. Admitting this evolution in thinking doesn’t mean I have bad feelings about growing up in Turners Falls. And it doesn’t make us weak to admit that if we used them before, we were wrong. It’s part of an emotional and cultural evolution that we don’t stand for people talking like that anymore. I remind you to illustrate how things change, people evolve and learn, and we all become more tolerant and thoughtful.

I am a proud third-generation TFHS graduate. I wore the blue and white for four varsity sports, with so much pride. I was a cheerleader, doing the tomahawk chop on that track on a Saturday morning in autumn. I was a class president, a representative in Washington, D.C., for young leaders, a student rep on the School Committee in 1991.

I am not an “outsider,” telling you what to do with your town. My roots run deep into Letourneau Way via Dell Street and Millers Falls Road. My mom and my dad both graduated from TFHS, as did dozens of cousins, uncles and aunts. You know my family, he was your friend at the Rod & Gun, the Elks, she sold you your first home, sat near you in church, he gave you a job when you were on probation, chatted with you at IGA, at the Glen.

My family has been in Turners Falls longer than three generations, though they did not all graduate from high school possibly because they were immigrants who spoke French, or as people now sometimes say they “didn’t bother to learn the language.” We forget that part because of the privilege of the color of our skin, our generic European heritage, which helped us blend in with, and marry in with, the English, the Polish, the Irish; my freckles contradicting the pronunciation of my last name.

We rarely talk anymore about the old feud between the Irish selectmen and French Canadians, hinting to the reason the French church is built with its back end to the Avenue. The now seemingly-slight cultural differences those groups fought over do not have a constant reminder in our modern world. That’s not so for the Native American people in this area. I fully participated in the marginalization of a group of people, and I didn’t know that was what I was doing at the time.

I will never know what it is like to see a caricature of my heritage used as a school mascot. But I do know that if someone says it doesn’t feel good to them, we should believe them. I have friends who disagree with me. But I am far from alone. Admitting that you change your mind about something doesn’t mean you are weak. It means you are strong. If there is one thing I know about our power town, I know we are strong.

Words and images matter. People learn and evolve. Whole civilizations change. Finding out new information is what humans are designed to do. We don’t call our friends the “r” or “f” words anymore. Admitting that we were wrong is strength. Change the mascot.

- Member, TFHS Class of 1992, Greenfield Recorder, December 1, 2016
By design, the process to consider the mascot was about learning at its core. The quote above was an opinion piece published in the local paper, written by a GMRSID stakeholder who, by all accounts, should be considered an insider by localists. However, she articulates what she had learned since her time at TFHS, and how she had revised her perspective on what she used to consider normal and acceptable. The mascot consideration process allowed organizational leaders to promote and practice their core values of persistence, integrity, empathy, and continuous learning. School committee members and others referenced these values throughout. They took learning seriously, and encouraged others to do the same.

As referenced earlier, the superintendent had been somewhat ambivalent about the mascot being a priority at the beginning of his tenure, but he learned more about how important it was through the inquiry events. He said, “The more I learned alongside everyone else, and listening to the local Native American population and all the harm it caused, it was really clear to me by February that it was the right thing to do.” Most of the other school committee members with whom I spoke said that they thought the process would have been smoother than it turned out because they had built in so many opportunities for people to engage in dialogue and learn.

They admitted that most people came into the process with their minds made up, and were not open to learning. For example, at the first community forum, of all of the presenters (approximately thirty-five individuals or small groups), only one did not take a strong stance on the mascot one way or the other. He was a white teenage boy who identified himself as a TFHS student. He said,

The mascot means a lot to me and it’s not meant to be offensive. I play sports, and a lot of athletes like the name and feel proud about the school and about seeing ourselves in the paper. If the name “Indians” is offensive, I want to know why. I
don’t understand why it’s offensive and I want to understand. If it’s to be changed, I want to be part of that process. (school committee forum, October 2016)

Despite the apparent divide and locked-in nature of people’s public statements, learning did occur for some stakeholders. The primary audience for the forums and inquiry events were the school committee members, as they were the ones who would be making the decision.

The perception among my interview participants was that school committee members took this responsibility to educate themselves seriously. The superintendent said,

[They were] genuinely trying to learn through those events, like they were watching videos, they were taking notes...pages and pages of notes when these speakers came...they were, many of them who really struggled with it, and didn’t know at the beginning, or even in the middle how they felt about it, or which way they were going to come down on it. They were very conflicted. (interview, March 2018)

One school committee member told me,

I think that people were so invested in doing the right thing as far as learning and educating themselves...also I feel like people did a really good job of hearing from the community as far as phone calls, and emails, and fielding questions. (interview, April 2018)

Videos of the inquiry events confirmed these perceptions. Most of the school committee members were taking notes, and they asked probing questions of all the speakers.

One school committee member said to me that she learned a lot about how important the Indians mascot was to the community. Another said, “I thought about it a lot. And actually I thought about it afterwards more than during because people would show up, and you know…” (interview, April 2018). She went on to explain that the political environment was distracting to her thought process while she was engaged in it. She said she was disappointed that the inquiry events were sparsely attended (video of the events confirmed this, as did other interview participants), and that “the people who didn’t show up were the ones I really thought should be there. [...] And that’s unfortunate because I learned
SO much.” She said that all of the school committee members did a lot of reading before each event because the speakers would send packets.

Some of the school committee members told me that they personally did not know how they would vote, especially those who were alumni of the schools, and that their opinions became more clear as they learned from the inquiry event speakers. One said,

I mean, I grew up in Turners, and I learned all the different...massacres and everything and all that stuff, but this was a really different experience because these are people who study this. Also the perspective of, not just the massacres and what that looked like, but the actual idea about what mascots do to kids, and how that, not just what it’s done to the past kids...the parents who have such strong beliefs about this mascot, but that piece of it was brought up a lot. [I asked if this was new information for her] Right, yeah...like I didn't understand a lot of, like back in 1913 when they decided to make it the Indian, I didn’t even realize that all these other schools were doing it too...it was like a fad. It wasn’t about Turners Falls AT ALL. And I remember very specifically one of the professors from Vermont, he specifically talked about that, and I was like, OK, this makes sense. This is not about OUR Indians, you know, and this town, this is a fad that happened. So that was one that I wish everybody had seen because that was really a turning point for me.

(interview, April 2018)

As a result of this process, other community members were prompted to question their assumption that the Indians mascot was not a problem. For example, a resident with three children in the GMRSD schools told me that the conflict over the mascot bothered her a lot, and she wanted that problem to go away. She explained that she did not see the reason to make a big deal of the mascot because the important part was the schools and the teams, not the name.

She then recounted two stories of events that changed her thinking. One was an article given to her that presented all of the arguments in favor of Native American mascots, and then “debunked them all” (interview, March 2018). She said she often thought of sharing this article with others, but had not done so. The other was an encounter with a new community member who had lived on a reservation and told her that the Indians mascot was deeply offensive to her as a Native American. She said to me, “I’m a white middle class
woman, and my life hasn’t given me instances where I felt that way, so I can appreciate someone else feeling that way, but I’ll never be able to wrap my head around it.” She had been able to recognize that other people had different perspectives that were as valid as her perspective, even if she could not understand them, and realized that she had learned something new.

In the discussion at the inquiry event focused on social justice, the school committee chair articulated a growing realization for him when he said,

Over [this process], I’ve come to feel that maybe I don’t know what the word “racism” means. Growing up, racism was more something you did, and if you didn’t do racist things, then you weren’t considered racist. [...] And now it seems to be considered more innate somehow in the culture. It doesn’t necessarily matter whether you do or don’t do those things. (inquiry event, November 2016)

He asked the speaker to define racism, and she said it was a form of discrimination that defines power and confers relative advantage and disadvantage based on race. He said, “Is this to say it refers as much to the system we operate in as much as it does, maybe, the people who are making decisions or taking action?” She went on to explain that her view of power is that it is performed within institutions, and that people learn racist ideologies, not because they’re being taught, but by participating in social institutions (inquiry event, November 2016). It was not clear to me if this represented his own learning, or if he was raising the question to help others to understand what he already did.

On the night of the February school committee vote that decided the fate of the Indians mascot, after hearing from the superintendent about his pedagogical perspective, other school committee members shared what they had learned through the process. One conveyed others’ learning when she said,

I think that some people have changed their minds. I could read, you know, one email that I brought tonight from someone who graduated in 1970, and who was a majorette, and she wore the war bonnet, and now she just feels that...now we have a
different understanding. Now she realizes that to wear a war bonnet is spiritual. It’s reserved for the elders. (SC meeting video, February 2017)

Another shared her own learning process:

We live in a diverse world. We live in a diverse economy. We live in a diverse district. We live in a diverse town, and our school district represents that diversity, and I think to ignore that is silly. We have students who have dual citizenship. They might be from Puerto Rico. They might be from different areas of the Eastern Bloc. [...] I think there are 17 different languages spoken at the school. I also think too that school is supposed to represent inclusion, not exclusion. At the beginning of the process, I was sort of on the fence. I was like, “Gee, I might want to hold back ‘cause I felt like maybe we should have education first, and then maybe a vote before we move on with the criteria.” [...] It didn’t feel like each side was necessarily all the time listening to the other and learning. So whatever I think I’ve learned from this process—any process the school committee engages in—we’re an educational institution. We’re supposed to help our students and our district move forward and learn and also celebrate diversity and inclusiveness. I want to be part of that. I want our town and district to be part of that, and if that means that people are gonna be unhappy, then people are gonna be unhappy. (SC meeting video, February 2017)

At a school committee meeting after the vote, a community member who described himself as “an admitted ‘outsider’ who has lived in Montague for a mere 28 years” read a letter in which he accused localists of not having been open to learning through the process. He said,

Unfortunately, the “traditionalists” were not really willing to think through the ramifications of the process and of the issue and have chosen to remain on the wrong side of history, ignoring the process of inclusion and protection of the minority from the tyranny of the unconstrained Majority. This tradition of protection of the minority is part and parcel to our country having been initially promoted by the Founders of the United States. (SC minutes, May 2017)

In this case, his reference to the majority was directed at localists’ ongoing organizing around the town referendum, and their insistence on the majority having their say.

Over a year after the vote, I asked the superintendent how things could have been done differently. He said he would have preferred more time to build understanding about social justice and diversity, but that most people had made up their minds from the beginning. He said,

I mean clearly the community wasn’t ready for it, but we knew that. [...] The work that we all need to do about understanding multicultural concepts and social justice, I
mean that’s huge work and nobody has done it thoroughly enough. We didn’t even have the beginnings of a framework as a community, as a school community, you know to grapple with those things. (interview, March 2018)

He said the key question was, “What kind of community do we want to be going forward?” and their assumption was that the community would come to understand that the traditional culture was not aligned with the kind of community they wanted to be. In the end, he felt that “people just had too much strong feeling about it to go through it that way.”

**Chapter Summary**

By applying Cohen, et al.’s (1972) garbage can model, I have illustrated how the decision-making system in the GMRSD during the 2016-17 school year was incredibly complex, as well as influenced heavily by timing, social interpretation, and politics. As predicted by the model, decisions depended less on rational deliberation, and more on participant attention, interpretation, and energy. The evidence presented shows that organizational leaders were required to attend to a wide range of elements due to their responsibility to meet external and internal policy requirements, and to ensure the overall survival of the organization. In contrast, other stakeholders were drawn into this system for a single issue—the Indians mascot—that resonated at an emotional level for individuals.

Focusing attention on this issue may seem illogical, as it has little direct connection to student achievement and attainment, or to meeting state regulations. However, focusing on a key identity marker of the organization resulted in a deep change process that ultimately created a more inclusive and supportive environment. This change process was guided by the organization’s core values, and organizational leaders’ commitment to remaining open to learning. In Chapter 6, I explore some themes that emerged that challenge current ideas about the effects of the current policy environment, and what motivates public school improvement.
CHAPTER 6
LEARNING FROM THE GMRSD CASE

Introduction

Public education policy reforms related to standards-based accountability and school choice were intended to work together by identifying quality schools, and providing multiple school enrollment options for families. The assumption was that schools would seek to meet accountability requirements in order to cultivate quality reputations, which would result in student enrollment and resources. The literature reviewed in Chapter 2 shows that these reforms have been problematic due to a lack of clarity with regard to goals, technology, and information. In addition, I have illustrated through the GMRSD case that complex organizations engage in “garbage can” decision-making processes that are not aligned to the rational assumptions behind these reforms.

As stated in Chapter 3, the purpose of a descriptive case study is to explore how something works, not to prove whether or not it works (Rossman & Rallis, 2012). Through my exploration of the complex workings of the GMRSD system during the 2016-17 school year, four themes related to how school organizations engage in change processes within a high-accountability/high-competition policy environment emerged that I discuss in this chapter. First I explore evidence that the parallel education reforms based on increased accountability to centralized authorities, and increased competition among schools adds load to garbage can systems, which decreases the likelihood that they engage in deliberative decision-making (Cohen, et al., 1972). I then focus specifically on the GMRSD’s mascot debate to explore how organizational culture change appears to motivate stakeholder engagement. The mascot element also provides an illustration of the ways in which normative institutional pressure can be an effective driver of school change, which I explore
next. This leads to a discussion of how the social and political dynamics of leaders within their organizations affect organizational learning and change. I end the chapter with concluding thoughts, and implications for public schools.

Accountability and Competition Increases Load on Garbage Can Systems

Cohen, et al. (1972) theorize that increasing the net energy load on a decision-making system increases problem activity, decision difficulty, and use of non-deliberative decision-making strategies (e.g., making more routine or quick decisions). Their model shows that problems are less likely to be solved under increased load, and that the decisions made are less likely to solve problems. The GMRSD decision-making system had been experiencing heavy load prior to the current superintendent’s arrival. Administrator turnover, school committee relationship dysfunction, district-town conflict, inadequate resources, academic programs that did not support all students’ success, and increasing family flight were all problems swirling around in the system. I described these in detail in Chapter 5.

Many of these problems were affected by state accountability requirements and school choice policies that entered the GMRSD’s environment beginning in the 1990s. The school committee chair described to me how they perceived these policy changes:

[...] the way the school choice system works, school choice and ed reform came in more or less the same time, I mean at least became prominent in our lives at about the same time, so now you have to improve on your MCAS scores every year, I mean, OK, that’s fine. And that’s gonna require certain kinds of activities, professional development, evaluations, a follow-up more professional development, coordination, etc., etc., etc. and here’s the model you have to accommodate. There’s no choice there, big fella! This is what you’re gonna do, or we’re gonna rate your school district as a four, which is gonna tell everybody they don’t wanna be there anyway, so they told us, “You have to be meticulous. And oh, by the way, you have to be sexy too.” (interview, November 2016)

In this statement, the school committee chair illustrates how standards-based accountability and school choice increased the overall load on the GMRSD decision-making system. He is describing how school districts are required to be “meticulous” in that they are forced to
attend to meeting state benchmarks or be labeled as poor quality schools and lose increasing
degrees of autonomy, yet they also have to be “sexy,” meaning they must be appealing to a
wide range of parents and students in order to maintain viability.

GMRSD leaders took both of these state-level requirements seriously. There was no
evidence of current or past organizational leaders claiming that state accountability
requirements for student achievement and attainment were unreasonable, or that they were
not interested in meeting them. They may not have been successful in doing so, but no one
sought to avoid or undermine them. Similarly, there was no evidence that organizational
leaders felt that they should not be responsive to families. There may have been conflicting
ideas about what constituted an appealing school, but no one contested the basic idea that
schools should meet a range of family needs and preferences. Taking on the work both of
these external expectations entailed increased load in the GMRSD system.

Another feature of the garbage can model regarding increased load is that elements
are understood within the context of a specific choice, but that interpretations of these
elements change during decision-making processes, as well as when they are placed into
different contexts (Cohen, et al, 1972). Changing interpretations of elements affect
participant attention, political dynamics, activity levels, and overall system energy load. The
Indians mascot is a good example of how reframing an element through a choice
opportunity affected system load.

The mascot existed as an element in the system in relative dormancy until it was
framed as a choice. This generated significant attention and energy, which revealed
competing interpretations that had most likely been there all along, but had not been
noticeable. This attention and energy not only made conflicts visible, it served to connect the
Indians mascot to other elements: the increasingly diverse student and community
population, costs associated with a change, attention to Native American history and culture in the curriculum, school reputations and family recruitment and retention, the organization’s responsibility to serve all students, and increasing awareness of social justice and equity among organizational leaders. All of this, plus the highly emotional aspect of the element due to its connection to organizational culture and stakeholder identity, served to increase system load, which decreased deliberative decision-making overall.

Although the process did not occur during the case study year, the Montague Center School closing is another example of how the GMRSD system was affected by increased load. Closing the school entered the system as a rational solution to save money, but was perceived as a problem by many families, especially Montague Center residents who were directly affected. In other words, the act of closing the school was socially interpreted based on one’s perspective. The choice opportunity to close the school was created through a political process when a motivated group of residents worked to get a question on the town meeting ballot for a community vote, not through a rational, deliberative process. Campaigns for and against the ballot question were also politically motivated, and highly emotional as evidenced by the extent to which residents were vividly recalling these events ten years later. The decision ultimately caused more problems by generating resentment and family flight (i.e., loss of resources) instead of solving the financial problems it had intended to address. This process may seem dysfunctional, but Cohen, et al. (1972) claim this is a typical feature of garbage can decision-making.

Meanwhile, conflict over the school closure decision drew energy and attention away from other potential solutions to save money, as well as other problems such as failure to meet academic expectations, disruptive student behavior, and a need to adapt to increasing diversity and need among students and families. This kept these elements active in the
system, thus maintaining load, and the load increased when the decision to close the school created more problems. Many of the elements present in the system during this period continued to exist in the system during 2016-17. Through the lens of a rational decision-making model, the district sought to increase efficiency by consolidating schools; however, through the lens of the garbage can model, the district was an organized anarchy struggling under a heavy load and subject to social and political dynamics, and the decision merely served to increase that load.

External accountability mandates and competition were intended to work hand-in-hand based on logical assumptions about how schools and families would respond; however, the GMRSD case illustrates that assuming rational responses is itself illogical if one is operating under the premise that schools are organized anarchies. Considering the elements in a garbage can system are interrelated, socially interpreted, and subject to political dynamics, it is impossible to untangle the effects of these reforms from each other, much less from school districts’ geographic, demographic, and historical contexts. One end result of layering on these policies that I have illustrated through this case study is a relative lack of predictable, rational processes.

**Organizational Culture Change Motivates Stakeholder Engagement**

As an organization, the GMRSD’s inability to meet regulatory requirements related to student achievement and attainment had decreased its legitimacy and viability over the past decade. Prior leaders had attempted to fix this by using compliance-based strategies such as test-preparation curriculum and punitive student discipline, yet these strategies had not improved student outcomes. More importantly, these change efforts had not captured the attention of the majority of organizational stakeholders. Those with the ability to leave the organization did so, and those who stayed either had no other choice or were satisfied
with the status quo. In contrast, a proposal to change the school’s primary identity marker, the Indians mascot, and thus its culture, in order to conform to wider norms of social justice and equity garnered intense stakeholder involvement on both sides. I argue that this shows that organizational culture change efforts engage a wide range of stakeholders in a change process.

For over a decade, the GMRSD had been under intense regulatory pressure to raise student metrics of academic achievement and attainment. This had produced compliance efforts that led to marginal and inconsistent success, but did not generate systemic organizational changes regarding teaching and learning practices, operational efficiency, or responsiveness to families. However, introducing the organizational identity problem of the Indians mascot engaged stakeholders at a deep emotional level, and motivated lasting organizational changes. In other words, pressure to meet external requirements, even under threat of sanctions, was not as relevant to the majority of stakeholders as the question, “Who are we?”

This level of engagement had occurred during another GMRSD change process that centered around identity: closing the Montague Center School. Stakeholders at this time were motivated to become involved, and cultural factions were revealed. On one side were the Montague Center families who faced losing a key part of the identity of their neighborhood—the community school. On the other side were stakeholders who were not attached to this identity, and were seeking to gain more resources for their own community schools. A decision framed from a regulatory perspective as one of increasing efficiency and leveraging economies of scale was interpreted as one of identity change by those involved on the ground. This threat of changing “who we are” was the motivating factor.
This research shows that a proposed change to organizational culture and identity symbolized by the Indians mascot resulted in highly engaged sets of stakeholders on both sides of the issue due to the personal and emotional nature of the changes that took place. Eckel, et al. (1999) explain that culture is the “invisible glue” (p. 22) that operates at individual, organization, and institutional levels. They suggest peeling away the layers of culture like an onion from artifacts down through espoused values in order to surface the underlying assumptions. In the GMRSD as a whole, artifacts included the various visible elements of the system as described in Chapter 4. The district’s espoused values were visible in mission, vision, and values statements, the strategic plan, and leader attention to diversity, community relationships, social justice, student SEL, and overall student success.

Improving student achievement and attainment are essential to organizational survival within the current policy environment; however, the element that captured stakeholder attention and consumed most of the organization’s energy during the 2016-17 school year was the Indians mascot. I argue that this was due to its connection to the underlying assumptions of three primary stakeholder groups—organizational leaders, localists, and regionals—and the fact that these underlying assumptions were incompatible and in competition with each other. The first speaker at the October forum stated, “We can’t choose both sides. We can’t have the mascot and also change the mascot.” This reality implied that the GMRSD would need to define their identity and culture, and some stakeholder groups would be excluded from that definition if they could not change their perspective.

Localists personally identified with the Indians mascot. It was more than a symbol to them. It was a way of life, and a way of defining themselves in the world. To them, the Indians mascot affirmed who they were as individuals and as a community. Schein (2010)
presents a framework for organizational culture that includes shared artifacts, values and beliefs, and underlying assumptions (see also Eckel, et al., 1999). The Indians mascot was an artifact of their culture. Peeling away the layers reveals espoused values of dignity, strength, honor, and pride, and a belief that the symbol honors the lives of Native Americans who had died in the massacre. However, the underlying assumption behind these values reveal unexamined values that center around themselves, and their history and traditions as a community. When these traditions and history were threatened by removing the primary symbol that represented them, this was emotionally activating. I liken it to the intuitive “fight or flight” response, and they geared up for a fight. No other organizational change had had this effect, as the organization had been focusing on changes to teaching and learning, or administration and operations, none of which held much personal meaning for the localists.

Regionalists, on the other hand, were activated at an emotional level because this was an opportunity for them to align an underlying assumption about the importance of social justice to an artifact of a public school. It was, in effect, the opposite situation to the localists, but both groups were attempting to align artifacts and underlying assumptions in their culture. I have described the regionalists as having a defined culture, but there were groups of stakeholders who were in favor of making a change who did not necessarily have taken-for-granted beliefs about social justice. They were the ones who were “on the fence” or disengaged, perhaps wondering aloud why this issue was important. They may have been operating based on espoused values of respect for others, or rationalizations related to not wanting to appear racist, but the threat of removing the Indians mascot did not emotionally engage them at the same level as regionalists and localists whose underlying assumptions were being activated. Based on some of the school committee members’ comments about what they learned, at least some people moved toward examining their culture at a deeper
level through the process. This type of deep self-reflection and change will alter their perceptions and behavior going forward in other contexts.

Organizational leaders were not as emotionally activated as a unit, even if some of them were as individuals; however, they were responsible to examine the potential disconnects between the district’s tacit beliefs and values, its espoused values, and its outward-facing artifacts. Once they decided to take this decision under consideration—however unwittingly—they needed to follow through on the examination because it became a public process that garnered attention. In 1913, the Montague schools (it was not regionalized then) were able to select the Indians as a mascot because it held different meaning for the people at the time. In 2017, they no longer had this option, as they would have effectively been choosing the Indians mascot anew if they had decided to keep it. To do so, they would have had to articulate the connection between their underlying assumptions and this artifact, and the learning process in which they engaged prevented them from being able to construct such an argument.

**Normative Institutional Pressure and Public School Change**

In the current policy environment, regulations are intended to steer school decision-making toward continual improvement of student and school performance. At the national level, standards-based accountability and school competition brought on by increasing family choice have shown unremarkable effects with regard to improving student and school performance overall, as well as in minimizing achievement gaps between groups of students based on relative advantage. In contrast, the GMRSD case shows that social norms of equity and justice, which lie at the heart of regulations that seek to improve all students’ achievement and attainment, can be effective drivers of school change in and of themselves without relying on regulatory pressures.
DiMaggio and Powell (1983) outline three types of institutional pressure—coercive, normative, and mimetic—that account for the tendency for organizations that share space and resources in a field to become more similar. An organization seeks to become isomorphic with its institutional field by cultivating structures that aligning with the “rational myths” of their field (see also Meyer & Rowan, 1977). For public schools, governments and cultural expectations exert what DiMaggio and Powell (1983) term coercive isomorphic pressures. These are forces such as state accountability requirements, standard operating procedures, and parental expectations about the types of academic and non-academic offerings that are available. Mimetic pressures apply in situations of uncertainty, and encourage schools to copy successful structures from elsewhere in the field, such as what nearby high-performing schools appear to be doing. Normative pressures stem from the profession of education, such as popular “best practices,” and steer schools toward certain curricular and classroom management approaches. Normative pressures also arise from professional norms about the purpose of public education, which in current times is focused on equitable access and achievement, as well as societal norms of social justice.

The GMRSD was definitely experiencing coercive pressures to conform to state expectations. It had been on “Turnaround” and “Accelerated Improvement” plans for a decade, and they continued to host outside evaluation teams to provide feedback on their progress toward meeting state requirements, even though these were voluntary efforts. By cultivating structures such as more student-directed learning, time and space for educator collaboration, detailed curriculum maps, and use of data to drive day-to-day instructional decisions, the GMRSD was attempting to cultivate legitimacy. Even by being symbolically open to state feedback, they were creating the appearance that they were conceptually aligned to state expectations.
This is not to imply that the GMRSD’s efforts to improve student literacy and numeracy were disingenuous. Meyer and Rowan (1977) explain how technical work can be complex and messy, and that organizations can effectively shield this messiness by cultivating the appearance of compliance. Showing the state and its surrogates that it was working on issues related to low student performance through isolated visits was one way in which it could avoid further critical inspection. Meanwhile, the difficult work of teaching children to read and write continued on in the classrooms, and was intertwined with supporting students’ social and emotional growth, and providing safe and supportive learning environments. These types of patterns had also occurred in the past. Prior administrators had encouraged a test-preparation approach to curriculum and instruction in order to boost standardized test scores, and to use punitive and highly structured disciplinary approaches to manage disruptive student behavior. These practices persisted despite their lack of effectiveness, and new leaders’ efforts to change them.

The GMRSD was in a situation of extreme uncertainty, yet organizational leaders did not seem to be especially responsive to mimetic pressures in the environment. They were consistently losing students to other schools that were perceived as doing things in ways that were more aligned with their preferences, or offering programs that were more appealing. When the superintendent entered the district, he stated in his entry report that they may want to look at what local charter schools and the nearby vocational-technical high school were doing, and to adopt some of these programs and practices.

As time passed, organizational leaders worked to maintain their existing programs to the extent possible, but they did not adopt any new programs that seemed to be successful elsewhere (e.g., offering Chinese language classes). Part of this was explained as not having the resources to adopt new programs, but they also made no effort to divert resources away
from programs they were already offering to make such a change. They were open to learning alongside educators from the Four Rivers Charter Public School, but this was more a collaborative effort to improve practices at both schools, and less about copying what Four Rivers was doing. Mimetic pressures did not necessarily influence GMRSD decisions.

Normative pressures, however, exerted a significant influence on the GMRSD as they considered the Indians mascot. For a hundred years, the Indians mascot had been on full display as the high school’s primary identity marker, and the district’s by association. Institutional isomorphism would suggest that the district had been out of normative alignment with its environment for a long time. Societal norms of social justice had become more part of mainstream culture, and discourse of equity and access had been ever-present in the field of public education since the advent of the federal No Child Left Behind Act of 2001. I argue that this was a case of loose coupling.

Weick (1976) theorizes that organizations are able to disconnect elements, thus protecting them as well as isolating them from the rest of the organization. Social norms developed in parallel to educational policies that were focused on student achievement and attainment. These policies drew upon norms of social justice and equity specifically in relation to metrics of achievement and attainment, which served to tightly couple these elements in schools. This explains the GMRSD’s attention to student metrics, especially subgroups based on race, class, disability, and English learner status. However, tight coupling in this area allowed the Indians mascot to become loosely coupled with school performance and accountability. Its legitimacy as an educational institution was not affected by this symbol in this context. As the superintendent said, it was a “don’t ask don’t tell” situation (interview, March 2018). The mascot was visible, but ignored within the policy environment because it was perceived to be irrelevant with regard to accountability, equity, and access.
Meanwhile, the Indians mascot became tightly coupled with localist culture, which was focused on athletics and school pride as opposed to academic achievement. This shows how the Indians mascot persisted and thrived for so long in a changing normative context.

When the GMRSD school committee agreed to consider the Indians mascot, they exposed it to exactly the type of critical inspection that it had avoided for so long. Many stakeholders spoke out to define it as a racist stereotype, and to criticize its origins in the massacre of Indigenous people. Localists attempted to make a strong case that the Indians mascot was intended to honor these people, and couched their argument in assertions that the symbol motivated the community to remember them, and to learn their history and culture. Since they had been relatively isolated from developing societal norms due to their narrow focus on their own culture and context, this argument made sense to them.

However, there was a counter-argument in the system that emerged through the voices of stakeholders who had a wider perspective, and who understood structural racism and systems of social oppression. As Jeff explained, this perspective made no sense to the localists, and his criticism of the process stemmed from what he perceived as a lack of effort on the part of regionalists to convey this message using language that they would understand. This was a culture clash in which two groups had completely different artifacts and underlying assumptions, even if they claimed some of the same shared values (Schein, 2010).

Wider social norms prevailed in this situation, as the process that organizational leaders developed was based on learning about what these norms were. One of the inquiry events focused on social justice. Another featured local Indigenous representatives who were well-versed in issues of social oppression and racism. Many stakeholders expressed these perspectives in forums, at school committee meetings, on the district’s Facebook page, and
individually to school committee members and presumably to each other. Discourses of social justice and equity made their way into the system and influenced those who had not been paying attention due to their privileged status as white people. Some who were open to learning about these “new” norms changed their thinking. Others likely rejected this information and continued to think and believe as they had before. However, those who did learn and change their thinking included key school committee members who then voted for the change.

Localists, in contrast, were not open to learning (or at least those who were visible in my data collection). Even after the vote to get rid of the Indians mascot they continued to assert that they were right. While my case study ended on June 30, 2017, localists who maintain this perspective will continue to act in accordance with their own cultural norms and assumptions in the GMRSD system. Their perspective on the system and behavior within it will continue to be aligned to these norms as opposed to those of the institution of public education.

Building knowledge alone is insufficient to enact change. Argyris and Schön (1974) discuss the connections between espoused theories of action, and what they term “theories-in-use.” A person can intend to behave a certain way, or insist that he has engaged in behavior for a certain reason, but the behavior reflects one’s theories-in-use, which are based on assumptions about self, others, the situation, and potential consequences of that behavior in that situation. The concept of theories-in-use is related to Schein’s (2010) conceptual framework of culture in that underlying assumptions are revealed through visible artifacts such as behaviors. If a person builds knowledge, yet this knowledge does not change an underlying assumption about how the world works, the change is more superficial and possibly only based on that particular context.
For example, localists frequently complained about needing to be “politically correct,” by which they meant that they were not allowed to use certain words or talk about certain things for fear of offending others. If a person learns to avoid certain words in certain contexts in order to maintain political correctness and avoid criticism, then he has engaged in what Argyris and Schön (1974) call “single-loop learning” by learning how to adapt to the situation. More substantial change occurs when a person is able to engage in “double-loop learning” by recognizing aspects of the context itself, and making contextual changes that solve the problem at hand.

In the case of the GMRSD, many regionalists provided examples of people who had engaged in double-loop learning. They recognized that the Indians mascot was problematic because it perpetuated systems of oppression. Removing it did not change these systems, but at least they were not being intentionally celebrated by the schools, and thus subtly reinforcing them. The action of removing it also symbolized support of historically oppressed groups, as well as a value of diversity and equity. Many in the GMRSD community likely engaged in single-loop learning. Removing the Indians mascot was acceptable because they did not attach personal meaning to it, or because removing it seemed to be important to some groups. In other words, they adapted to the context.

Localists, on the other hand, did not engage in any type of learning. They steadfastly insisted that they were right, and refused to consider other perspectives. They sought Native American allies who espoused their beliefs and values, and rejected the perspective of local Native American representatives. One exception is their learning about the disconnect between the cultural reference to Plains tribes in the logo. Toward the end, Jeff and Chris talked about being willing to compromise by changing the image to be more aligned to Northeast Woodlands tribes, but not the name “Indians.” In this situation, unwillingness to
learn resulted in not being able to adapt to the change. In addition, their social and political position as the numerical majority also spurred continued efforts to convince others of their perspective due to their belief that democracy is always based on majority rule.

**Leader Effects on Organizational Learning and Change**

The GMRSD engaged in a significant change process to align itself to its normative environment, and they were successful in doing so; however, this may not have been the outcome had the superintendent not played a key role in shaping the interrelationships between elements in the system. He did so by using a distributed conception of leadership and organizational learning, and was successful due to a variety of sources of social power to which he had access. This enabled significant and lasting changes that were aligned with his goals to occur.

In school organizations, school committees and superintendents are assumed to have the positional authority to make high-level decisions, which one could assume would allow them to make changes that were in line with their goals. Yet for over a decade prior to the case study year, GMRSD leaders had not been successful in achieving more than compliance-level, superficial changes to how the organization engaged in its work, and as a result, conditions that negatively affected student learning and organizational viability persisted. Spillane, Halverson, and Diamond (2001) propose the concept of distributed leadership under the assumption that “leadership practice is constituted in the interaction of leaders and their social and material situations” and not about individual traits, attributes, or skills (p. 27). They claim that human activity is distributed in the “interactive web of actors, artifacts, and the situation” (p. 23), and that it is more important to know how and why leaders act within their particular contexts than to know what they do. This idea relates well to the systems approach through which I have explored the GMRSD case. While I did not
specifically examine prior leaders, information about turnaround frequency, and its effects on relationships, consistency, trust, and follow-through on initiatives indicates that frequent change in leadership had resulted in a disjointed, loosely-coupled system of individuals who were focused on pursuing their own personal agendas. No one was steering the ship.

The GMRSD superintendent operated in such a way that it was clear that he did not assume that his positional authority, managerial skills, or pedagogical knowledge were sufficient to make lasting changes to the organization. Early evidence of this is the 2014 strategic plan objective titled “learning organization,” which focused on “creating a culture of adult learning driven by goal setting, feedback, collaboration, and accountability.” This indicates that he was aware that others’ learning was essential to meeting organizational goals. This included teachers, administrators, and school committee members. This idea of a learning organization is based on the work of Senge (2006), who suggested that organizational survival depended on five “disciplines” of organizational learning: systems thinking, personal mastery, mental models, building shared vision, and team learning. These disciplines are conceptually different than skills or “best practices.” Instead, Senge likens them to the creative process, which integrates continual practice with innovation. Through his focus on organizational learning, the superintendent created conditions in which stakeholders throughout the organization continually developed shared understanding and personal skills to carry out the work of supporting all students.

When the superintendent arrived, he shared his personal values—integrity, consideration, and learning—then engaged organizational leaders in a process to define organizational vision, mission, core values, core beliefs, and learning principles. This thinking informed the district’s strategic plan. These organizational artifacts bear a remarkable resemblance to the superintendent’s personal values. This implies that he was able to access
organizational power in order to create outcomes that aligned with his personal vision (Salancik & Pfeffer, 1996). The superintendent had various sources of what French and Raven (1959) refer to as bases of social power, and these enabled most of his efforts to be successful. Coercive power implies that one is able to force others do something, or enact punishment. Reward power is the opposite: one is perceived as being able to provide a reward in return for doing something. While it was true that the superintendent could have provided rewards or punishments in order to enact his will, he did not tend to do either of these things. As superintendent, he had legitimate power to control organizational decisions based on norms within the institutional environment of public education governance. This is related to the idea of positional authority. Instead of relying on any of these sources of social power, the superintendent relied instead on the referent and expert power that he was afforded within the organization.

Referent power is conferred when one identifies with or is attracted to the other person. The superintendent is relational and trustworthy. He models effective and supportive leadership. He provides direction, makes space for diverse opinions, supports others, and follows through on what he claims he will do. He possesses what Salovey and Mayer (1990) refer to as emotional intelligence, or the ability to recognize and regulate emotion in oneself and others. One school committee member said that they decided to take on the mascot issue because they felt supported by him. All of my interview participants who had interacted with him were universally complementary of him and his work, and attributed district improvements to his efforts and vision. This referent power sets up conditions in which people feel comfortable engaging in conversation with him, or asking questions. He takes people seriously and acts respectfully. His commitment to social justice, and insistence on equity for all students is part of the discourse in the system partly because
his ideas and values are attractive to school committee members due to their positive association with him as an individual. In short, he is a likeable person, and people go along with his vision because they admire him, and perhaps want to model their own behavior and thinking on his.

As an experienced educator, he also has expert power within the system. His prior successful experiences in the classroom, as a school-level administrator, and as a district-level administrator give his ideas weight among administrators and faculty, as well as among school committee members, many of whom are not trained educators. His comfort and skill with quantitative as well as qualitative data extends his expert power throughout all of the various components of his job. He speaks as knowledgeably about budgeting and finance as he does about social and emotional learning strategies. As someone who professes to value continuous learning, he keeps up with current research and promising practices in the field, and can engage in informed conversation about these topics. All of these aspects enable him to move the organization toward his goals.

Following the garbage can model (Cohen, et al., 1972), the superintendent was able to use these sources of social power within the organization to create choice opportunities and gain access to decisions about organizational learning. This allowed him to steer participant attention and organizational work toward what Salancik and Pfeffer (1996) refer to as “critical contingencies,” or in other words, the elements on which the organization decides to focus its limited resources. A critical contingency for the superintendent was organizational learning in the areas of social justice and diversity awareness. He created opportunities to reflect on organizational values and decide on a vision and strategic plan that was aligned with this focus. He directed staff and faculty attention toward learning about how to support a diverse population of students, increase understanding of social
justice, and build a mindset that every student’s achievement is important. He was successful in doing these things because anyone who might have attempted to redirect resources or attention (e.g., school committee members or administrators) liked him and trusted his professional judgment. These opportunities helped the organization as a whole to learn how to serve all students.

**Conclusion and Implications**

This research started with questions about the effects of school choice on public schools, and an idea about how the complexity of school organizations prevents linear, rational solutions to pervasive problems of student achievement and attainment. Through this case study, I have illustrated the ways in which public school organizations are socially and politically complex, and not conducive to rational decision-making. This problematizes assumptions upon which education reforms related to accountability and competition are based. I have also shown that threats to organizational identity and culture are highly motivating in terms of stakeholder engagement in a change process. This calls into question the assumption that schools are highly motivated to improve student achievement and attainment due to regulatory pressures and competition alone, as well as the assumption that layering these pressures facilitates effective action and efficiency.

The findings the emerged from the GMRSD case indicate that schools that have cultures that are founded on values and beliefs about academic learning and achievement may be highly motivated to change in these areas if these aspects are threatened in some way, but those that have cultures founded on other values and beliefs about the purpose of schools and their place in communities may be motivated to change for different reasons. This research also revealed the strong influence of normative pressures on school change. If the goal of public education is to improve all students’ academic achievement and
attainment, governments may have more success in promoting change by approaching the achievement gap problem from a normative standpoint by focusing attention on shared norms of academic access and equity within communities instead of on individual achievement and attainment.

Issues of organizational culture have been a topic of research in the fields of business and management since the 1970s (Tierney, 1988), and there are frameworks with which to consider the important effects of culture on organizational change efforts (Eckel, et al., 1999; Schein, 2010; Senge, 1999). However there are few studies of culture change in K-12 public schools. This is perhaps not surprising, as school culture is not often directly associated with student achievement and attainment in the way it is currently measured. However, there is a literature base on the community aspects of schools, especially rural schools such as those in the GMRS and the surrounding area. Examining the connections between students’ achievement and attainment and their sense of alignment and belonging to the culture of a school community would be interesting to pursue. There are also obvious connections between school choice and families’ search for “people like us,” as well as the difficulty established TPS districts have when they are required to be generalists, yet want to reinvent themselves by taking on a specific theme or approach.

This research also reveals significant gaps in the literature with regard to how the current public education policy environment affects rural and suburban school districts that are not part of a major metropolitan area. Aside from the problematic aspects about assuming school organizations are able to engage in rational decision-making that I have outlined, the basic mechanics of choice-based school enrollment are completely different in contexts where there are declining populations, sparsely populated geographies, transportation issues, and different economic realities than in urban and metropolitan
settings. The GMRSD may be just as economically diverse as a section of Boston, but the rural poverty of white people looks and feels different than the urban poverty experienced by people of color. More research into the effects of public education policies that were designed to address urban problems within urban contexts is necessary.
APPENDIX A

IRB APPROVAL LETTER

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Amherst, MA 01003-9242

Research Compliance
Human Research Protection Office (HRPO)
Telephone: (413) 545-3428
FAX: (413) 577-1728

Certification of Human Subjects Approval

Date: October 5, 2017
To: Laura Davis, Education
Other Investigator: Sharon Ballis, Edac Policy, Research & Admin
From: Lynnette Leidy Sievert, Chair, UMASS IRB

Protocol Title: Investigating Public School District Decisions in the Context of School Choice Policies
Protocol ID: 2016-3407
Review Type: EXPEDITED - RENEWAL
Paragraph ID: 7
Approval Date: 10/05/2017
Expiration Date: 10/29/2018
OGCA #: 

This study has been reviewed and approved by the University of Massachusetts Amherst IRB, Federal Wide Assurance # 0000909. Approval is granted with the understanding that investigator(s) are responsible for:

Modifications - All changes to the study (e.g. protocol, recruitment materials, consent form, additional key personnel), must be submitted for approval in e-protocol before instituting the changes. New personnel must have completed CITI training.

Consent forms - A copy of the approved, validated, consent form (with the IRB stamp) must be used to consent each subject. Investigators must retain copies of signed consent documents for six (6) years after close of the grant, or three (3) years if unfunded.

Adverse Event Reporting - Adverse events occurring in the course of the protocol must be reported in e-protocol as soon as possible, but no later than five (5) working days.

Continuing Review - Studies that received Full Board or Expedited approval must be reviewed three weeks prior to expiration, or six weeks for Full Board. Renewal Reports are submitted through e-protocol.

Completion Reports - Notify the IRB when your study is complete by submitting a Final Report Form in e-protocol.

Consent form (when applicable) will be stamped and sent in a separate e-mail. Use only IRB approved copies of the consent forms, questionnaires, letters, advertisements etc. in your research.

Please contact the Human Research Protection Office if you have any further questions. Best wishes for a successful project.
## APPENDIX B

### GMRSD SCHOOL COMMITTEE MEETING ARTIFACTS AND VIDEOS

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APPENDIX C

SAMPLE DATA CODING

In “Phase 1” coding, I identified problems, solutions, choice opportunities, and decisions that appeared in school committee meeting minutes July 1, 2016—June 30, 2017. This sample data set is focused on costs, budgeting, and resources. Other categories included: adult learning and culture; curriculum, instruction, and assessment; governance, leadership, and management; operations and services; parents and community engagement; performance and state accountability; student conduct, social and emotional learning, and school climate; and vision, mission, and values. A colored box indicates the month during which an element was mentioned (c = choice; d = decision; v = school committee vote; p = problem; s = solution).

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APPENDIX D

INTERVIEWS

NOTE: To protect confidentiality, I list a primary identifying characteristic of each participant; however, many of them also had additional relationships relevant to the GMRSD. For example, a participant could be a school committee member, an alumnus, and a parent of a current GMRSD student.

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APPENDIX E

RECRUITMENT LETTER AND EMAIL TEMPLATES

[paper] To Whom It May Concern:
I am a doctoral student at the University of Massachusetts Amherst in the College of Education, and am conducting a study on the types of organizational decisions small, rural school districts make in response to the variety of school choice options that are available to its students and families. This includes other local schools that accept students through the state’s school choice program, charter schools, and vocational-technical schools.

I am seeking participants for a research project: Adults, age 18 or older and not currently enrolled in a secondary school program who match any of the following categories:

• Gill-Montague Regional School District (GMRSD) employees (e.g., administrators, teachers)
• GMRSD school committee members
• Adult family members of current school-age children who reside in the district's three towns (Montague, Gill, and Erving)
• Employees of public school districts that accept students who are GMRSD residents
• Employees of community organizations who provide programs or services to the GMRSD
• Individuals associated with the GMRSD organization (e.g., alumnae, residents of Franklin County)

I would be interested in hearing your ideas on public schools and school choice as a member of this community. Your experiences and ideas would help me to develop a better understanding of how small public school districts, their families, and related stakeholders function within a public schooling environment that provides many options. Should you choose to participate, you will complete at least one 30-60 minute interview. In some cases, I may ask participants to complete additional interviews over the course of the study (no more than ten).

It is your choice to participate, and there are no consequences for declining this request. I have attached an Informed Consent Form that I will review with you in person should we meet, and ask you to sign prior to our conversation. It contains detailed information about what your participation would require, and steps I am taking to keep all records confidential and anonymous.

Please contact me at lcdavis@educ.umass.edu to let me know if you are interested. You may also call my cell phone at 413.575.5718. I am happy to answer any questions you may have.

Thank you for your consideration,
[attach informed consent form]

[Email] Dear ___________

I am a doctoral student at the University of Massachusetts Amherst in the College of Education, and am conducting a study on the types of organizational decisions small, rural school districts make in response to the variety of school choice options that are available to its students and families. This includes other local schools that accept students through the state’s school choice program, charter schools, and vocational-technical schools.

I would be interested in hearing your ideas on public schools and school choice as a [school committee member, teacher, staff member, etc.]* Your experiences and ideas would help me to develop a better understanding of how small public school districts, their families, and related stakeholders function within a public schooling environment that provides many options. Should you choose to participate, you will complete at least one 30-60 minute interview. In some cases, I may ask participants to complete additional interviews over the course of the study (no more than ten).

It is your choice to participate, and there are no consequences for declining this request. I have attached an Informed Consent Form that I will review with you in person should we meet, and ask you to sign prior to our conversation. It contains detailed information about what your participation would require, and steps I am taking to keep all records confidential and anonymous.

Please respond to this email to let me know if you are interested or not. You may also call my cell phone at 413.575.5718. I am happy to answer any questions you may have.

Thank you for your consideration, [attach informed consent form]
## APPENDIX F

### PHASE 2 ADDITIONAL ARTIFACTS

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<thead>
<tr>
<th>Date</th>
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<td>Board continues ban on controversial Turners Falls High School ‘tomahawk chop’</td>
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<td>Town of Gill</td>
<td>Gill Commission on Education: Report to Town Meeting</td>
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<td>Gill-Montague Regional School District Level 4 District Review</td>
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<td>Building Bridges to Success</td>
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<td>Case Study of a MA High School with Improving Cohort Graduation Rates and Declining Annual Dropout Rates</td>
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<td>Sheffield ES School Improvement Plan</td>
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<td>Hillcrest Elementary under investigation for alleged abuse of students: Parents allege abuse by staff at the school</td>
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<td>My Turn/Singleton: Chapter 70 the real culprit</td>
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<td>Daily Hampshire Gazette</td>
<td>Michael Sullivan: Charter schools impact district funds</td>
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<td>Turners High students find perception of bias isn’t always reality</td>
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<td>Montague Reporter</td>
<td>Residents Ask School Committee To Again Rethink Mascot</td>
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<td>No finding of abuse at Franklin County Elementary School</td>
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<td>Gill-Montague superintendent seeks community input on new Sheffield Elementary principal</td>
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<td>Native American speakers focus on impact of mascot, call for education during Turners Falls forum</td>
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<td>Didn’t we ‘bury the hatchet’ on Turners Falls’ logo already?</td>
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<td>Editorial: Talks on Turners mascot, while thorough, need to come to a head</td>
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<td>Gill-Montague School district looks at possible cuts in upcoming budget</td>
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<td>Group gathers signatures for Turners Falls Indian referendum</td>
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<td>More information about the Gill-Montague Regional School Committee meeting</td>
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<td>Montague Selectboard approves non-binding Turners Indian referendum</td>
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<td>Turners Falls students protest elimination of “Indians” nickname</td>
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<td>About 120 Turners Falls High School students walk out to protest mascot vote: Say they felt School Committee did not fulfill promise to have student voices heard</td>
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<td>Parents, students rally for beloved Gill teacher whose job is in jeopardy</td>
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<td>Vast majority of Erving voters want Indian mascot back</td>
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<td>One School Committee seat contested in Gill</td>
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<td>Budget cuts lead to the possibility of combining 5th and 6th grade students in Gill</td>
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<td>Winners in G-M school election were endorsed by Indians mascot backers</td>
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<td>Residents vote four to one to keep Indian mascot at Turners Falls High School</td>
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<td>Mascot Fallout: Voters Support 'Indians,' Drop Two School Committee Members</td>
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<td>Levenson resigns from Gill-Montague Regional School Committee</td>
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<td>Mike Langknecht back on Gill Montague School Committee</td>
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<td>G-M, Four Rivers schools collaborate with science grant</td>
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<td>Native American speaker: Indian mascots pay homage to history</td>
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<td>Op Ed problem with Indian mascots</td>
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<td>Gill-Montague School Committee finalizes mascot task force</td>
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<td>My Turn: Admiration for those who spoke up for Turners Falls logo</td>
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<td>Mohawk Sup’t to fight against charter school renewal</td>
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<td>Four Rivers responds to Mohawk district concerns</td>
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<td>Editorial: Mounting confusion over who’s on the hook for missing budget money</td>
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<td>Wave rally ends Turners’ run, 22-18</td>
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## APPENDIX G

**FIELDNOTES NOT INCLUDED WITH OTHER ARTIFACTS**

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<td>10/5/2017</td>
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<td>GMRSD supt reports to school committee AY17</td>
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<td>GMRSD supt reports to school committee AY18</td>
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<tr>
<td>11/23/2017</td>
<td>Observation</td>
<td>TFHS Turkey Day Football Game</td>
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<tr>
<td>3/8/18</td>
<td>Facebook</td>
<td>Sheffield ES page - 7.1.16-6.30.17</td>
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<td>4/8/18</td>
<td>Facebook</td>
<td>Save the TF Indians Logo - 7.1.16-6.30.17</td>
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<td>4/11/18</td>
<td>Facebook</td>
<td>TF Alumni Who Think a New Mascot Would Be Fine - 7.1.16-6.30.17</td>
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Informed Consent Form for Participation in a Research Study

University of Massachusetts Amherst

Researcher: Laura Davis
Study Title: Investigating Public School District Decisions in the Context of School Choice Policies

WHAT IS THIS FORM?
This form will give you information about the study so you can make an informed decision about your participation.

WHO IS ELIGIBLE TO PARTICIPATE?
Adults who are age 18 or older may participate in the study.

WHAT IS THE PURPOSE OF THIS STUDY?
This research project seeks to investigate the types of decisions that are made within the Gill-Montague Regional School District organization (GMRSD), located in Montague, Massachusetts, in the context of school choice policies that give families the right to enroll their students in a variety of public and private school options. I want to understand the types of decisions that are made and by whom (for example, school leaders, teachers, parents, etc.), factors that influence these decisions, how different members of the community perceive and respond to the decisions, and how outcomes that result from these decisions are evaluated.

WHERE WILL THE STUDY TAKE PLACE AND HOW LONG WILL IT LAST?
I will conduct this study in western Massachusetts during the 2016-17 and 2017-18 school years.

WHAT WILL I BE ASKED TO DO?
If you agree to take part, your initial participation entails one 30-60 minute interview, which may or may not be audio-recorded. In some cases, I may ask participants to complete additional interviews over the course of the study (no more than ten). I will seek permission each time if I would like to interview you again. You may agree to be audio-recorded or not by checking a box below. I may also ask you to suggest additional participants, and assist me in contacting them for this study by delivering a recruitment memo via email or paper.

WHAT ARE MY BENEFITS OF BEING IN THIS STUDY?
Your participation will help members of the GMRSD and others to understand how school choice policies affect small school districts. Otherwise, there are no direct benefits to participants.

WHAT ARE MY RISKS OF BEING IN THIS STUDY?
If you are an administrator or school committee member of the GMRSD, you will not be assigned a pseudonym, and statements in this interview may be directly attributed to you in written materials that I share with colleagues, and/or include in the final report. For other participants, I will assign a pseudonym to use in all notes and fieldnotes. While I will take every precaution to keep your identity confidential, there is a slight chance that you may be identified based on contextual information and/or quotations contained in notes or other written materials that I share with colleagues, and/or the final report.

(continued)
Informed Consent Form for Participation in a Research Study
University of Massachusetts Amherst

HOW WILL MY PERSONAL INFORMATION BE PROTECTED?
I will be using the following procedures to protect the confidentiality of this study’s records:

● To provide a layer of anonymity, I will be using pseudonyms for all interview participants in all fieldnotes and written materials except those who are GMRSD administrators and school committee members.

● All material study records, including audio recordings, paper documents, and digital files, will be kept in a locked file cabinet to which I have the only key. No other persons will have access to these files.

● Any computer or electronic device hosting and/or storing electronic study records, including audio recordings, will have password protection to prevent access by unauthorized users. Only I will have access to the passwords.

● At the conclusion of this study, I may publish my findings. All material and digital records that contain personally identifiable information will be destroyed or deleted three years after the close of the study.

WHAT IF I HAVE QUESTIONS?
Take as long as you like before you make a decision. I am happy to answer any question you have about this study. If you have further questions about this project or if you have a research-related problem, you may contact me at 413.575.5718 or lcdavis@educ.umass.edu. If you have any questions concerning your rights as a research subject, you may contact the University of Massachusetts Amherst Human Research Protection Office (HRPO) at (413) 545-3428 or humansubjects@ora.umass.edu.

CAN I STOP BEING IN THE STUDY?
You do not have to be in this study if you do not want to. If you agree to be in the study, but later change your mind, you may drop out at any time. There are no penalties or consequences of any kind if you decide that you do not want to participate.

SUBJECT STATEMENT OF VOLUNTARY CONSENT
When signing this form I am agreeing to voluntarily enter this study. I have had a chance to read this consent form, and it was explained to me in a language which I use and understand. I have had the opportunity to ask questions and have received satisfactory answers. I understand that I can withdraw at any time. A copy of this Informed Consent Form has been given to me.

☐ I agree to be audio-recorded today.
☐ I do not agree to be audio-recorded today.
☐ (For prior participants only) I agree to use of prior interview data collected since September 2016.

_______________________________________________________________
Participant Signature                Print Name                  Date

By signing below I indicate that the participant has read and, to the best of my knowledge, understands the details contained in this document and has been given a copy.

_______________________________________________________________
Signature of Person                   Print Name                  Date

Obtaining Consent

University of Massachusetts Amherst-IRB
(413) 545-3428
Approval Date: 02/28/2018
Protocol #: 2016-3407
Valid Through: 10/20/2018
IRB Signature: [Signature]
BIBLIOGRAPHY


Chester, M. D. (2014). *Building on 20 years of Massachusetts education reform.* Boston: Massachusetts Board of Elementary and Secondary Education.


