HOLISTIC CHANGES IN SCHOOL STRUCTURE AND ORGANIZATION

by

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A thesis submitted in conformity with the requirements for the degree of Doctor of Philosophy
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0-612-53698-X
Holistic Changes in School Structure and Organization

Doctor of Philosophy, 2000
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Abstract

In this thesis I examine the bureaucratic structure and organization of schools developed within social systems that reflect a western, industrial-based, consumer-oriented, patriarchal and anthropocentric orientation. I proffer that these structures are inhibiting factors that impede many dedicated educators from implementing innovative programs. I argue that our schools need to embrace more organic models that view problems and solutions as systemic and promote holistic development of our institutions.

My research is a story, revealed in a case study and reported as a narrative, of the staff of a junior high school who embark on a transformational journey toward creating a holistic school structure and classroom organization. The foundational transformation is the creation of a team of three teachers and approximately 75 students. This community of learners, located in one large classroom, is inclusive and remains together for three years. The day is blocked and the team of teachers is responsible for all the core subjects and delivers them on their schedule. Other transformations include the use of integrated curriculum, authentic student assessment (centered around student-led conferences based on portfolios), and community partnerships. Administration has been changed from a hierarchical principal - vice-principal - teacher organization to an administration team that includes a teacher member from each classroom team.

In order to frame the narrative analysis, I review historical influences, including progressive education, team teaching, open and middle school movements. This history, along with an in-depth look at long-term student-teacher relationships, the essence of the project, provides a vivid backdrop for the Jubilee Junior High School story. Using interviews, observations and documents from the teachers, students, parents, and community members who were involved, as well as my personal experience as principal and researcher, I recount the story
in an integrated narrative. The data is presented in a dialogic format, which allows all participants to be acknowledged and not hidden or overpowered by the voice of the researcher.

The narrative analysis of the Jubilee School project indicates that the most powerful element in the transformation of the structure and organization of the school is the development of strong, long-term relationships among participants of the team. Spending five hours together each school day for three years provides the students and teachers with an opportunity to collaborate and to gain a sense of continuity. Available time to develop trust in each other facilitated the establishment of significantly deeper caring and committed relationships. Other strengths identified include an increase in student responsibility, more open and ongoing communication among all participants, a greater number of involved and informed parents, teachers with an increased feeling of efficacy, shared leadership, and sustained professional collaborative support.
Dedication

This work is dedicated to the staff of
Jubilee Junior High School
1990 – 1998

Without their willingness and courage to step into the unknown and begin and complete a journey with heart, this thesis would not have been possible and the immense learning of all that participated would have been lost.
Acknowledgements

All journeys are made with the assistance of guides, although sometimes they are hidden in the shadows. I would like to acknowledge those colleagues, friends, and relatives who made my doctoral journey possible. I would like to thank the professors at OISE who expanded my understanding of curriculum during my course work. In particular, I thank my advisor, Jack Miller, who patiently but firmly guided me through the pitfalls and dead-ends of thesis writing. I am indebted to David Selby and Joel Weiss, committee members, who helped me clarify my writing with their critical but fair advice. Finally, I appreciate the efforts of the other readers of my thesis, Rina Cohen, Brent Kilbourn. I extend a special thanks to my outside reader David Townsend, a long-time mentor, for his careful proofing of my thesis document.

To my friends and colleagues who were always there to listen to my complaining, provide encouragement and a gentle nudge when necessary, many thanks. In particular, I am eternally grateful to Sandy, my “study buddy”, who accompanied me while on her own doctoral adventure. We shared our anxieties and joys with many three-hour breakfasts and coffees. Jason who was there from the beginning with the “Gang of Four”, including Lilja and Tracey, never let me wallow in self-pity. He just reminded me, “Pain is our friend”. He too was a fellow doctoral traveler. I thank Linda, Stephen and Janet, for providing safe haven for me to write and create.

I would like to thank my many colleagues in the Grande Yellowhead School Division, Alberta and at OISE (University of Toronto) who were excited about my research and provided a spark of excitement each time my energy faded.

Finally I would like to acknowledge my children, grandchildren, parents, siblings, and other relatives, many of whom must have thought I was crazy to leave my job and go off to complete this educational quest. They provide me an anchor of stability. They are patient with my “gypsy” ways and always supportive with unconditional love. Thank you all! You are part of my narrative and serve as guides on my journey. Now, on to the next adventure.
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Chapter 1 – Introduction

Imagine a middle level classroom with about seventy students and three teachers teaching and learning together. It is a spacious classroom in a junior high school where two such classrooms are found in each of the three grades: seven, eight, and nine. Each cohort of students and teachers remains together for three years and they spend the bulk of the day together as a community of learners. The teachers are responsible for all the core subjects: Mathematics, Science, Language Arts, Social Studies, Health and Physical Education. The teachers also have the discretion to create their schedule and activities for each day. The only possible schedule considerations are the gym time, option periods (about fifty minutes each day) and the provincial curriculum guidelines. The program described above, which operated for six years and had four teams complete the three-year cycle, is the focus of this thesis.

The teachers on each team are self-selected and volunteer to be involved in the implementation of this large group classroom project. Each teacher team chooses a leader internally to represent them on the school administration team. The students are randomly divided into one of the two grade seven teams as they arrive at the junior high school from seven feeder elementary schools. The philosophy of education for each team and teacher is certainly not identical. However, through a process of professional development and collaborative workshops a common vision developed. At the centre of this philosophy is an assumption that if teachers and students spend more time together each day in regular classroom activities instead of moving from class to class, a caring relationship will develop. This large group classroom was created to develop an extended three-year continuity, nurture deeper commitment, and generate more effective communication than normally experienced in a junior high school. It was believed that this large group classroom would also allow teachers to improve their ability to develop curriculum, individualize, and evaluate student progress. A more detailed outline of these beliefs can be found in Appendix A.

Each classroom is double-sized with one wall covered with windows and the other three supporting whiteboards, shelving, and bookcases. The students’ desks are arranged in the center area in a constant variety of patterns from rows to groups of two to four. There is a bank of five computers on one wall and science equipment cabinets, counters, and sinks on another wall. The
teachers' desks are placed around the room. The walls are decorated with student work, motivational posters, and rubrics (reminders of the criteria for quality work). There are also bulletin boards for daily and weekly schedules, homework reminders, individual student mailslots, and a mailbox for assignment drop off. A telephone is also located in the classroom allowing direct connection to the community. One of two entrances lead into a common area, which has six large octagonal tables and chairs used for group work and lunchtime. Lockers line one wall, windows another, and white boards line a third. This common space adjoins an identical area of another large classroom. The second entrance leads out into a small back area used for study, storage, and a fire escape. There is another similar large classroom next to this one and two more are found on the second floor.

The organizational change of placing three teachers together with seventy students in one classroom for three years promoted continuity of curriculum delivery. The planning for the achievement of curriculum objectives and the development of activities occurred on a daily, weekly, and yearly basis among three teachers who taught continuously in front of each other. This common teaching experience and planning resulted in a situation that was flexible enough to take advantage of "teachable moments" as they presented themselves. The continuity provided the teachers with a holistic knowledge of the students' skills and attitudes. This allowed for insightful modification for student programs, holistic evaluation and reporting, along with consistent expectations of student behavior and work quality.

It would be inaccurate to say that each classroom operated the same since the three teachers each brought their own individual educational philosophies and experiences into the classroom. But generally, this is how they organized their teaching. Curriculum was based on the mandated provincial curriculum objectives for all subjects. These objectives became even more influential on the daily classroom activities in the third year of the project as yearly Provincial Achievement Tests in Grade Nine were introduced in Mathematics, Science, Social Studies, and Language Arts. The results of the tests were published and used to evaluate schools and their staff. However the teams attempted to integrate subjects within this restriction and utilized projects and themes to accomplish this task. Presentation of curriculum was a combination of large group lectures and notes, small group work, tutorial groups, individual projects, integrated units, and work placement in the community.
Student evaluation was influenced by the outcome based education philosophy of William Spady (1988, 1994) as the school division had adopted a strategic plan that highlighted the development of five-student exit outcomes. The large group project had started prior to the adoption of the student exit outcomes but it certainly did influence the direction of instructional objectives and student evaluation. The emphasis of the student evaluation process was on the replacement of marks on report cards with progress reports outlining student attainment of curriculum objectives, including the five exit outcomes. Students were involved in their evaluation with the use of portfolios, which were the focus of a student-led parent teacher conference. This process of reporting student progress occurred three times a year in November, March, and June. Quality work was developed with the use of class generated rubrics and the continuity developed by the same three teachers collaboratively evaluating all of the subjects over three years.

No one-curriculum philosophy was proposed or evident. This project did not develop out of a particular packaged program or process. It was created and implemented from within the school and in relation to four components: team teaching and long-term relationships, integrated curriculum, community development, and “authentic student evaluation” (characterized by the elimination of marks). These building blocks are outlined in more detail in Appendix B.

The teams’ efforts to integrate cross-curricular objectives and skills were more successful than the achievement of transdisciplinary, a form of theme integration. However, each team was able to implement at least two projects or themes each year. There were typically elements of cooperative learning or group investigation; direct instruction (lecture and notes) and memorization; inquiry learning as part of group and individual projects; and tutorial sessions in each class. A constructivist attitude was evident as students were being encouraged and allowed to develop their own programs and explore the community for answers to their questions. Again, no specific teaching philosophy or program was officially articulated.

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1 These outcomes include competent problem solver, effective communicator, critical and creative thinker, collaborative team member, and socially responsible citizen.
2 As outlined in Drake (1993, p. 46-47) the teachers at Jubilee School were most successful at the multidisciplinary and interdisciplinary approach. Our goal was transdisciplinary.
From my observations as both principal and researcher I saw teachers and students working collaboratively on a daily basis. They were able to deal effectively with any difficulties or challenges from internal conflicts and external pressures (such as request for information, student testing, parent meeting, teacher illness, or remedial appointments) with cooperation, flexibility, and minimal disruption to classroom activities. The rapport developed between teacher, student and parent over extensive daily and yearly contact was partially due to the substantial amount of time spent together, which provided many more opportunities for teachers to assist students both as individuals and as a class. Communication with parents appeared to improve since both teachers and parents had a longer period of time to get to know each other. This thesis outlines the development of this three-year process and the effects it had on the teachers, students, and parents at Jubilee Junior High School.  

Problem of Inquiry

It is as I begin this stage of the doctoral journey that I finally “get down” on paper the story of my research, the culmination of all my reading, reflecting, and information. I revisit the relevance and significance of my thesis and consider “Why is the research about holistic structural changes in the organization of Jubilee Junior High School important?” Or as Marshall and Rossman (1995) call it, “Should do-ability” (p. 6). What is my problem of inquiry?

Writing a thesis seems to me to be an in-depth conversation that examines my own experience (research topic). It presents my ideas, methods, observations, and conclusions for my consideration. It is a very personal experience but not one carried out in isolation. And the end result should be a learned account of some strands of education that will be woven into an already existing tapestry of knowledge. Many thesis advisors and students who have completed their doctoral program see the process as a journey. In a collection of articles edited by Cole and Hunt (1994), members of a thesis support group at OISE recall their personal journey as students or advisors. However, in the final analysis there are no short cuts and each student must make the journey, because ultimately “the journey belongs to the traveler” (p.162). I take full

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3 From this point on Jubilee Junior High School will be referred to as Jubilee School.
responsibility for my journey, the research process and the destination. But how did I come to research and write about this topic?

I was influenced by a number of sources. Most notably I was influenced by the requirements of the institution to which I belong, the Ontario Institute for Studies in Education of the University of Toronto (OISE / UT), and the opportunity to practice the art of research. Other more personal influences came from my school colleagues whose combined ideas brought the Jubilee School project to life. There were also my university classmates and advisors at OISE, and other educators I met at conferences or presentations. Once I described the Jubilee School project, people I encountered typically became excited and interested in our ideas and notions of change and encouraged me to document the project’s development.

I was also guided by my internal convictions. My arrival at the start of the doctoral program in 1994 was proceeded by four years of work with a staff who created and implemented a collaborative school-based action research project. The decision to formally research the project was made only after it had started. It came from a personal desire to tell the story of these brave teachers who initiated a journey filled with heartbreak and celebrations, sadness and joy, camaraderie and conflict, and significance and courage. The staffs’ expressed wish for me to write an account of their transformational experience also influenced my decision to begin this research project. Finally, I felt it was a story worth telling in its own right. Although my reasons for initiating the research are personal, I believe that there are several reasons why anyone would want to read this thesis.

Call for Educational Changes

It does not take much research to realize that our North American, consumer-oriented, economic growth-at-all-cost, non-sustainable society is at risk (Carson, 1962; Diamond and Orenstein (eds.) 1990; Durning, 1992; Eisler, 1988; Orr, 1992; Postman, 1993; Sahtouris, 1989; Smith, G.A., 1992; Spretnak, 1993). One need only pay attention to the media and one’s own senses. But what is even worse is that we in the “north” are endangering all other humans outside of our “over-developed” world and the earth itself. Berry (1988) outlines this pathological pursuit of economical growth in the name of “progress” in The Dream of the Earth. He describes how
education must help bring a realization of this dysfunctional human endeavor, and he also
indicates public education for its role in creating the problem. He states:

Thus the question of meliorism appears, the tendency to constantly modify an
existing system without changing the basic pattern of its functioning. What is
needed is a profound alteration of the pattern itself, not some modification of the
pattern. To achieve this the basic principle of every significant revolution needs to
be asserted: rejection of partial solutions. The tension of the existing situation
must be deliberately intensified so that the root cause of the destructive situation
may become evident, for only when the cause becomes painfully clear will
decisive change take place. The pain to be endured from the change must be
experienced as a lesser pain to that of continuing the present course. (p. 158-159)

O'Sullivan (1994) observes that education has been co-opted by capitalists and
industrialists in order to train workers and create consumers for their products in our schools. He
cites Aronowitz and Giroux (1993) who suggest that, “ideologically, this meant abstracting
schools from the language of democracy and equity while simultaneously organizing educational
reform around the discourse of choice, reprivatization, and individual competition” (p. 29, chap.
4). Pike and Selby (1997) add that as “…the concept of ‘global competitiveness’ takes root in
public debate, so schooling is pushed inexorably towards servicing the global market economy”
(p. 22). O’Sullivan also challenges educators to address this present condition and he states,
“...education must involve itself in a radical transformation and creative venture” (1994, p.11,
intro.). I see this study as a way to tell the story of a group of educators at Jubilee School who
began a holistic transformation of one school’s organization and structure.

I also believe the holistic nature of our universe and the earth must not only be taught to
our young people as a concept, but also modeled (J.P. Miller, 1993a and 1993b) in the
institutions and organizations in which the students are being educated and those they will
eventually work in, vote for and be governed by. As Marshall McLuhan (1968) stated “the
medium is the message” (p. 23-35). I believe it is important to tell the Jubilee Story because it
reveals what form holistic and transformational change might take in a school context and,
further, reveals the effects this change has on teaching and learning.

The story presented in this thesis is even more relevant in light of recent government
cutbacks to the public sector in many Canadian provinces, most notably Alberta and Ontario
(Barlow, 1994; Livingstone and Hart, 1993; Taft, 1997; Taylor, 1996; Townsend, 1998; Vivone,
The current approach by business and manufacturing companies has taken on a global, tough-minded, competitive fervor and this corporate mentality has influenced governments and their social departments as they attempt to raise themselves to corporate or business standards. In the last decade our schools have tended to marginalize the humanistic qualities of education for the efficient, back to basics, bottom-line goals of the corporate agenda (Barlow and Robertson, 1994; Cammaert, 1995; Elliott, 1994; McQuaig, 1995; Saul 1993 and 1996; Shaker, 1998). The increase in standardized testing, competitive rankings, and downsizing techniques has resulted in less emphasis being placed on the caring relationships that can exist between teachers, students, and parents, which are so vital to the ultimate goals of an education system in a democratic society (Arhar, 1992; Hargreaves et al., 1990; Kohn, 1991; J.P. Miller, 1993a; R. Miller, 1990; Moffett, 1994; Noddings, 1995). These authors also call for action and for practitioners to attempt to make changes. The changes made at Jubilee School, which run counter to these traditional non-humanistic government policies and programs, provide an alternate perspective. It is my hope that this thesis will offer encouragement and insight to other educators as they develop plans to make changes in their own schools.

Location in the literature

Although the Jubilee changes have philosophical and structural aspects that are similar to prior changes initiated in public education, including those that took place in the progressive, open, and middle school movements, as well as the team teaching initiatives and looping (student and teacher together for more than one year), they are unique in their combination. In particular, this thesis examines the long-term relationships developed over three years of daily classroom activity among teachers, students, and parents. My literature review revealed few examples that matched the Jubilee School project in which a combination of changes were initiated. In this respect, the Jubilee School project appears to be unique.

Methodology

The application and value of this research project was most significant to my colleagues and I as action research at the school level and a form of professional renewal. It provided us with an opportunity for collaborative reflection in the form of interviews and observations and
thus had ongoing significance. As Hunt (1987) states, “practice makes theory”. Telling and retelling the story of our experiences during the research assisted us in transforming our pedagogy and the educational experiences of our students.

Parallel to this action research aspect, there has been a need or call in curriculum circles for more research to not only occur in the classroom but also include teachers and practitioners in the process of research. This thesis is an attempt to “bridge the theory-practice gap” (Cole, 1989, p. 226). Such scholars as Lather, (1986), Schwab, (1969), and Short, (1991) have questioned whether or not curriculum research can inform practitioners. They suggest that the problem is partially due to the lack of practitioner involvement. I agree with Flake, Kuhs, Donnelly, and Ebert (1995) who observe, “research emerging from practice has a natural life in schools because the questions are more appropriate, the investigations are more natural, and the findings more credible and valid for school practice than is the case with research conceived, conducted, and interpreted in the clinical settings of higher education” (p. 406). This research is definitely about “life in school” and asks teachers to provide narrative accounts of their experiences.

Finally, my uses, of narrative analysis and dialogic reporting are not unique but relatively new (last 20 years) and rare in educational research. This format of research reporting might be of interest to other researchers who would like to adopt a similar research methodology.

**Research Intent and Questions**

My overall purpose is to tell the story of the staff and students of Jubilee School as they completed a three-year educational journey together. Their journey will be reported as a narrative spanning eight years and include conversations with many of those involved. During the telling and subsequent conversations I will ponder a number of questions. The development of the research questions follows.

I have always had questions about education in general and about my classroom experiences, in particular. This daily questioning about effectiveness of curriculum, student behavior, lesson plans, and student evaluation has been posed in a reflective way and answered and requestioned on a daily basis as I interact with students and colleagues. Usually it simply led to more questions. As a teacher you ask and answer questions with colleagues in informal settings, including coffee time, staffroom conversations, lunchtime, and beers on Friday nights,
and formally at staff meetings, workshops, PD sessions, and during personal evaluations. When I began my doctoral studies at OISE I arrived with a host of questions that had been raised during the implementation of our school project, which at the time was already in its second year of operation. However, after participating in David Hunt’s course “Practitioners’ Experienced Knowledge” during the summer of 1995 at OISE, I followed Hunt’s process for determining research questions as outlined in *The Renewal of Personal Energy* (1992). In particular, I followed an “inside-out” process, the techniques of which I practiced during my course work with him.

My Masters thesis research4 (Babiuk, 1987), although located in the qualitative genre, was still an “outside-in” experience. I completed a case study of a school division’s teacher evaluation program by conducting interviews and gathering documentation. This was a movement away from the quantitative style that was the norm in educational administrative circles at the time. However, reflecting on that experience, I realized that I was still using what Hunt calls the “UFO”, or the “Unilateral, Fixed and Objective” model (1987, p. 115). I was a researcher and although I interviewed voluntary participants, they still were subjects of the research. There was little reciprocal about our relationship, other than our sharing of opinions on the teacher evaluation process. Moreover, while I did provide the participants with a copy of my draft account of our interviews, they were still very much subjects who I observed and whose behavior I tried to understand. I did learn a great deal about teacher evaluation, which I believe assisted my practice as an administrator who evaluates teachers. As well, I hope other educators who read my thesis and subsequent summary article in “The Canadian School Executive” (Babiuk, 1988) gained some insights. However, I doubt that the participants were assisted to any great extent in improving their practice or experienced knowledge. This is an example of the development or “verification” of theory in order to assist practice.

I have come to believe, as Hunt so insightfully stated, that “practice makes theory”. That is to say that in our day to day practice of teaching we can, through being reflective, responsive and reciprocal, develop theory out of practice. It is “common sense” that guides us to improve and construct theories about our teaching practice. The following is a description of this process.

---

4 My first formal attempt at research.
I used the following seven steps as outlined in Hunt, (1992, p. 122-133) to help me not only clarify my research topic but also provide a continuous guide and “well spring” of creativity and flexibility as my research developed its own life and story. The first step was to bring out my attitudes toward research. Unlike my first taste of “real” research during my Masters thesis work, I have since come to believe that research and theory are opposite sides of the same coin. In other words, they are part and parcel of the same phenomenon, the creation of experienced practitioner’s knowledge, or praxis. In all cases the theories developed through practice are largely contextual and most valuable to the participants. Thus, I have come to conclude that the best research is completed in one’s own “backyard”. It is a form of “action research” that allows one to transform one’s own practice along with one’s colleagues or participants. While the research may be relevant to other people and situations, this is only true insofar as the story described enables them to reflect on their own educational practice. In this way, it is much like the process outlined in the Journey Metaphor. I understood research as a continuous spiral from “call to adventure” all the way “to return and renewal”. Hunt (1992) summarizes my feelings about the purpose of research:

To acknowledge that inquiry into human affairs is itself a part of human affairs is also to acknowledge that the results of inquiry are influenced by the intentions and expectations of both the researcher and the persons being researched, as well as by the relationship between them. Researchers in human affairs are often reluctant to admit the human side of their activity since it erodes their detached role as “social scientists” which is the basis of their research expertise, a belief borrowed from the physical scientists. Calling their work science cannot erase the fact that researchers are persons, too, and researchers’ failure to acknowledge this is a major reason for the irrelevance and lack of practical value of their research. (p.111)

In reflecting on my previous experience both as a research subject and a researcher, I recognize the need to consider the needs of the participants, develop a trusting relationship, and ensure a reciprocal dialogue between researcher and participants.

The second step was to define and refine my research topic. The following is my intention statement: “I want to discover, with the help of my colleagues, if significantly changing

5 The journey metaphor is based on the work of Joseph Campbell. For a discussion of the hero’s journey see Drake (1993) and Miller et al. (1990).
the structure and organization of a junior secondary school will bring about a movement by teachers toward holistic and transformational educational practices." As Hunt (1992, p. 123) indicates, this statement can act as a "gyroscope", through which to guide one's research journey. Other questions that were of interest to me when I initiated my research include:

1. How has this new teaching experience changed teachers' educational philosophy about "What's important?"

2. Will students and parents see the changes in the same light as the educators?

3. To what extent can a "reflective culture" be established to replace the "hierarchical educational leader"?

4. How has the movement toward integrated curriculum changed teachers' student assessment techniques?

5. How will the relationships among students, teachers, parents, and community change, if at all?

6. What kind of culture or ethos will develop in the school community?

The third step was to clarify my research topic by "bringing out" my implicit theories about the topic. This process was helpful insofar as it enabled me to be wary of my biases and work toward finding the surprise or mystery. Also, it will help the reader to place what I am writing in the context of what is now explicit in the theories that I, the researcher, hold on the topic. The following are some of my implicit theories about the relationship of school organization and the movement to lasting holistic and transformational education practices. I believe that:

1. School structures and organizations must transform into more holistic and organic structures that reflect or mirror the natural world,

2. Schools were designed and refined with the assembly-line, mechanistic world view in mind and must change to a more holistic or systemic model in order for us to move more successfully into the ecozoic era,

3. The role of principal as "educational leader", "expert", "know-it-all", must change in order that all educators take on leadership roles,

6 These theories were developed and recorded during class assignments completed in Dr. Hunt's six-week summer course in 1995.
“principal as teacher, and teacher as principal”, all members of a school or education team must contribute to a reflective culture in which everyone participates in decision making; all are leaders and followers,

changes in teaching pedagogy that reflect holistic, transformative and global outlooks can only be sustained with profound changes in the organization and structure of schools.

The fourth step was to examine my image of research, which I believe involves action. In this case I used the image of a ship. I see myself as the captain of a ship that is sinking in a sea called public education. Not all passengers or crew on the ship, “HMCS Jubilee”, agree that we are sinking, but little by little I wish to help teachers see the need to abandon ship and start off in their own row boats with like-minded colleagues. Some teachers, students and parents feel they want to continue the voyage in the same ship and believe I am giving them false information. As a researcher, I am trying to gather information in my ship’s log so I can eventually share with others in order to help all of us better understand our situation (Babiuk, 1996).

The fifth step involved getting in touch with the phenomenon. For me this was not difficult. I have been a principal and a community member in Edson for eight years, during which time I have been immersed in the school community. The first two years I was in “survival” and “critique” mode. However, ever since two teachers came forward with a seed of an idea, we have been working collaboratively to bring about significant changes in our working reality. Thus, while completing the research I did not have difficulty entering the context. However, I did need to ensure that the people I interviewed were aware of my project and provided with an opportunity to express their views. I endeavored to listen to all, reporting their story whether or not they agreed or approved of the changes.

This leads me to the final step, which requires the researcher to opening up and remain open during their research. This was my greatest challenge. As I am an advocate and co-designer of the changes implemented at the school, I have a vested interest in the outcome. My account of the story is “biased”. I attempted to be vigilant in monitoring my biases. I outline how I accomplished this in Chapter Three. Hunt (1992) also suggests a way to deal with this dilemma. He states a researcher needs “to be open to surprise, which is how I recast the challenge posed by
‘experimenter bias’ " (p. 129). There were many surprises for both the participants and myself during our journey.

The next chapter will provide a historical backdrop for the narrative analysis of the Jubilee School project. I conclude this introductory chapter with brief summaries of the remaining chapters.

**Thesis Outline**

**Chapter Two – Historical Focus**

A historical perspective of the concept of long-term teacher-student relationships is the focus of this chapter. The origins of the progressive education, open and middle school movements, team teaching, and Adolescent Nature are traced. Their influence on long-term teacher-student relationships is considered. The chapter concludes with a comparison of the holistic structural changes made in the Jubilee School project to holistic, global, and transformative educational thought.

**Chapter Three – Methodology**

In this chapter the methodological foundations of this research are outlined. The topics developed include the methodology, implementation choice, interpretation and reporting choice, challenges to scholarly analysis, and ethical considerations. A discussion of qualitative methodology, ethnography, action research, participant observation, case study, and narrative analysis is also included.

**Chapter Four – The Jubilee Story**

This chapter is the (re)counting of the Jubilee School story. It outlines the findings of the research project using the Journey Model metaphor (Drake, 1993) as the underlying pattern (Appendix N) and utilizes a conversation format to record the participants' recollections and highlights them in their own voice. The narrative follows the six teams as they journey into team teaching and long-term teacher-student relationships. The start-up, turbulent encounter with the lobby group, the resulting compromises, and the culmination of their three-years together are described in detail. The research is presented as a narrative analysis.
Chapter Five – Narrative Dialogue

I utilize the Story Model (Drake et al., 1992) as a framework through which to present a conversation among participants which explores their experiences in their long-term relationship (Appendix O). The format of old story, present story, and new story aid in revealing the transitional nature of their experiences. The voices of teachers, students, parents, school superintendent, trustees, and my own voice as principal and researcher can be heard as we discuss our feelings and thoughts about the three year journey in large group instruction. The chapter concludes with observations on the challenges encountered.

Chapter Six - Last Word

The concluding chapter provides a space for the principal “I” and the researcher “I” to explore the consequences of the Jubilee School story. In particular we discuss our insights into the research questions and reflect on our roles in the research process as both participant and researcher. I conclude the thesis with a conversation concerning the implications of this research project.
Chapter 2 – Historical Focus / Review of the Literature

Introduction

A review of the literature is an attempt to locate one’s research in the body of knowledge already accumulated in an academic field and bring focus to the research topic, to delimit it as it were. In researching a school, one that is in the process of significant changes, the task of gaining focus is even more difficult. Schools are an almost endless interconnecting web of social and cultural threads found in the personal, communal, and organizational relationships. Each area has a myriad of possible topics that could be considered for research but all are intertwined with each other. Various components of the Jubilee project, including relationship and community building, integrated curriculum, alternate student evaluation, and shared leadership, could have been chosen. However, I decided to focus on the foundational component of our change: the teaming of three teachers in one classroom with a cohort of seventy students. Because all components are interconnected, focusing on one component is potentially misleading since all the parts act together in a holistic way to create the atmosphere and culture of the classroom. I have chosen to focus on the most significant and unique aspect of the changes carried out at Jubilee School: the intense three-year long-term relationship between teachers, students, and parents.

The following account provides a context for the Jubilee School story told in the narrative analysis of Chapter Four and Five. I trace the historical connecting threads back to the progressive, team teaching, and open school movements, and their subsequent effect on current middle school programs. I hope to offer a wide-angle view. I then provide a narrower focus by reviewing the concept of long term relationships in schools, or looping, in more detail. Then, I attempt to clarify some misconceptions of historical comparisons to the Jubilee School project. For example, some people, after hearing a preliminary description of the project, have indicated that it seems to resemble a form of progressive education, Open Education, an exemplar school project, or a form of team teaching. I deal with each example case by case. These comparisons offer a narrower more detailed account, or a kind of microscopic view. I conclude this chapter by presenting holistic, global, and transformative education philosophies as a foundational frame through which the threads of the tapestry-like historical outline presented earlier in the chapter can be woven into the descriptive threads of the Jubilee project to be outlined in Chapter Four.
and Five. This historical overview reflects the interconnected nature of the current changes to the past. It is essential, for as Schubert (1986) states, “to be ahistorical, devoid of perspective on one’s past, is indefensible. If people have thought and worked in one’s area of concern, one must take responsibility to learn about what has gone on before” (p. 54). The following chapter is my “responsible” attempt to link my research to the past.

Wide Angle Historical Lens

**Progressive Education Movement**

“Conservatives as well as radicals in education are profoundly discontented with the present educational situation taken as a whole. There is at least this much agreement among intelligent persons of both schools of educational thought” (Dewey, 1938, p. 89). This statement could have been made in 2000, since it seems as if we are still living in an atmosphere of discontent over what constitutes “good” education. Jackson (1992) summarizes:

> The most fundamental split of allegiance among people who think about education, ... has to be between those who want change of one kind or another (proponents of reform) and those who prefer to keep things pretty much as they are (the defenders of the status quo). (p. 13)

In Jackson’s (1992) discussion of the history of curriculum development he uses “five perspectives” to describe the major movements. Eisner’s (1979) “five basic orientations” and Prakash and Waks’ (1985) “four conceptions of excellence” are also useful categorizations to help focus discussion of curricular change in general and “progressive” curriculum in particular. Jackson’s (1992) five perspectives include; “conservative or reactionary position”, “nature of the individual learner”, “instrument of social change”, “effective management”, and the “cognitive process”.

Early curriculum discussions emerged from conservative forces, who sought to preserve the status quo, and progressive forces trying to change and modernize the system. However, the progressive forces for change split into two more perspectives: those concerned with the nature of the learner, led by the likes of Dewey, and those concerned with social conditions outside of school, led by the likes of Bobbitt. This reform split would again be modified several times in subsequent years leading to our current situation.

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7 These five perspectives were distilled from McNeil (1977), Eisner and Vallance (1974), and Kliebard (1987), and in fact Jackson refers to them as “...new wine in old bottles” (p. 15-16).
The "conservative or reactionary" perspective has its roots in those who believe in the status quo, or wish to maintain or restore the subjects and teaching methods of the past. It is the perennial "back to basics" position. The proponents believe that there is a "right" way, or traditional way to teach a known reservoir of knowledge, usually contained in the academic disciplines. Other names for this perspective are "academic rationalism" (Eisner, 1979) and "excellence as disciplinary initiation" (Prakash and Waks, 1985). Jackson (1992) argues that once a reform position becomes established it takes over the conservative position in its resistance to change.

The second perspective, the one most referred to as progressive, relates to the "nature of individual learner" and is exemplified by Dewey's work. "The case is of Child. It is his present powers which are to assert themselves; his present capacities which are to be exercised; his present attitudes which are to be realized" (Dewey, 1902, p. 209). The belief, that the individual student needs to be provided with the means of freeing his or her potential, is clear. Other terms used to describe this position are "personal relevance" (Eisner, 1979), and "excellence as self-actualization" (Prakash and Waks, 1985). This perspective is part of what is called the "progressive education" movement. "Progressivism was a multi-faceted political and social movement which has lent itself to various, even contradictory, interpretations by historians" (R. Miller, 1990, p.39). In fact, it is often difficult to determine from all the educators who have either claimed or have been labeled to be progressive what in fact is their underlying philosophy.

However, Dewey, at his death, was announced as the "Father of Progressive Education" and Zilversmit (1993) states:

He had inspired a movement to establish new schools that would be democratic rather than authoritarian that would make learning meaningful and pleasurable by focussing on the needs and interests of children. Dewey advocated a radical change in school methods, shifting from memorization and recitations to learning activities based on experience. (p. 1)

It should be noted that much of what progressive education came to mean was in fact used to justify or encourage specific curricular implementations that were not necessarily "progressive". The term "progressive education" has come to mean different things to different people. It has suffered the fate of an idea that is labeled. Once that happens, whether or not the implementation of the curriculum innovation is carried out as intended, others use the label even if it fails to resemble the original idea. This can lead to misunderstanding and disillusionment. This has
happened to many new programs and this certainly was the case with progressive education both in the United States and Canada during the 1930s and 1940s. Patterson (1986), in describing the Canadian response to Progressive Education, states, “many teachers attempted to conform to the new expectations, but lacking as they were in understanding, conviction, and ability, they failed for the better part to effectively employ the new doctrine”, which led to “…confusion, misunderstanding and of course, misapplication” (p. 75).

We are reminded by Zilversmit (1993) that the original progressive educators were more interested in the process of making changes to a traditional school system, than the outcome of that change. “We need to see schooling as a process that is necessarily confronted with continuing demands for reform. Schools have to develop different ways of meeting the changing needs of our society. Schools will always be in need of reform” (p. 183).

One example of a concerted attempt to make “progressive” changes to secondary schools occurred in the 1930s and 1940s. It was called the “Eight Year Study” and, upon investigation, I discovered it was as radical an attempt to transform schools as any I have come across in my review of literature. The project involved thirty high schools from across the United States that critically and creatively looked at how they were preparing their students for life after high school in general and college and university entrance, specifically. The project was spawned by the Progressive Education Association and a general discontentment with the quality of high school instruction. The process of change was idiosyncratic for each of the thirty schools and their communities. There was a national steering committee made up of prominent educational leaders, who would assist in monitoring the thirty projects and conducting evaluations. In addition the committee worked with colleges to develop acceptable entrance requirements that would accommodate the emerging students from these programs. Aikin (1942) outlines the general feeling of those involved. The thirty schools were and are “experimental” and they “believe that every school in a democracy should be, also. No aspect of any school’s work should be so firmly fixed in practice or tradition as to be immune from honest inquiry and possible improvement. It is only in this way that life and vigor are maintained and progress achieved” (p. 19).

The anticipated promise and the results, although certainly not the same across the thirty schools and in many cases open to interpretation, seem to indicate success. Hawkes’s report included in Aikin (1942) indicated that: “…the students from the schools whose pattern of
program differed most from the conventional were very distinctly superior to those from the more conventional type of school." He further explains, "it looks as if the stimulus and the initiative which the less conventional approach to secondary school education affords sends on to college better human material than we have obtained in the past" (p. 150). So why didn’t this program of innovation continue? What has happened to these “progressive” high schools? There have been “progressive” and other innovative program initiated at the high school level, but as Sizer (1992) states, 

We too rarely recognize that today we know far more about the stunningly complex processes of learning than we did ninety years ago, but the template of American secondary education that was struck then is very much in place. (p. 85)

Before I look more specifically at other movements that came out of the “progressive” philosophy of child-centered education, I present a brief overview of the Canadian experience. Patterson (1990) indicates that there was a great deal of interest in Canada with these new ideas coming out of the progressive movement in the United States. Many Canadian educational leaders had encountered these ideas during visits to the United States and American teacher educators were invited to work in “summer schools” across Canada to pass on the progressive message. This extensive activity, “…reveal[s] the heavy reliance of Canadians on American expertise in explaining, defining and popularizing the new ideas” (Patterson, 1990, p. 107). Although Progressivism had its advocates across Canada, Patterson (1990) concludes:

...there is no question these ideas caused Canadians to reexamine and to change their schools. The extent of the change appears to have been superficial at best and more characteristic of the rhetoric of the period than of the actual classroom behavior of most of Canada’s teachers and students. (p. 110)

Featherstone, cited in Jervis and Montag, (1991), sums up the disappointment of many people who supported the progressive education movement. "There’s a great paradox in the history of progressive education. On the one hand, it has been an education movement committed to escaping the past—to being ‘progressive’ in the sense of creating something as fresh and new as childhood itself", and “on the other hand, progressive education in the last fifty years has often seemed stuck in its own past, its eyes firmly fixed on increasingly ancient glories” (p. ix). This feeling that “progressivism” hasn’t lived up to its potential is also part of the R. Miller’s (1990) and Callan’s (1990) critiques of Dewey’s underlying beliefs. Miller comments:

...In truth, the culture of professionalism, and its manifestation in the Progressive movement, represented a large step toward centralized, bureaucratic control of
society, with the professionally disciplined upper middle class imposing a moralistic discipline on the rest of society. The early twentieth century saw American society take a large step backward from its democratic ideals, a step in which education played a major role. (p. 44)

Titley (1990) states, "progressives and social gospellers (often the same people) did not seek the abolition of social distinction, rather they wished to reduce class conflict and foster a sense of organic unity in society" (p. 81). "In short, even Dewey’s aversion to class divisions signifies no departure from an essentially conservative theory of democratic progress" (Callan, 1990, p. 93). R. Miller (1990) agrees with the above critique. He sees Dewey’s call for change as "neither radical nor conservative" (p. 101). The changes made in the schools and classrooms of America to date are "cosmetic" and "diluted", and have not produced the "...sweeping changes in the philosophy, curriculum, methods, and administration of public schools” that the Deweyian laboratory schools sought to create (p. 120). One criticism of Dewey and his "progressives" were their consistent "diminishing of spirituality" as an important element in the education of a child (R. Miller, 1990, p.104) and their failure to "...address the global and spiritual levels [of holism] in any significant way" (R. Miller, 1991b, p. 30). Moreover, progressive movement did not seem to effectively address key structural aspects of public education.

Although the Jubilee project can be considered a "progressive" type of educational program, as it displays some similar ideals, it was not consciously modeled after any one particular progressive program.

**Team Teaching**

It seems incredible that team teaching would not have been utilized to some extent as an option for classroom teaching before the 1950s, but then public schooling is only about 100 years old. Our current schooling in North America developed out of a Western European society. Before the 1800s, few people in Europe were formally educated, except by individual tutors in the case of the rich. With the advent of the one-room schoolhouse in North America, which was the primary schooling model for a largely agricultural society, a single teacher worked with a single class of multiage students. However, increased industrialization brought urbanization and the "efficient" factory system that influenced the development of the educational model toward a single, specialized teacher with a class of students. So how have we come to take the single teacher, single classroom model for granted? With respect to organizational and structural
components of schooling, such as the school day, the school year, the Carnegie unit or “seat time”, and numerical grades, educators in schools have come to consider that these structures are the only structures, believing that if they have lasted this long they must work. Clearly, this was the mainstream view concerning single teacher classrooms in North America until the early 1950s.

Early history. The origins of team teaching are not obvious; nor has it occurred in a lock step fashion, where one event leads to another. On the contrary, there are threads of influence from many different sources and origins. Edmonds (1973) writes:

...the movement towards working in teams goes back a good deal further. Indeed, some few experiments were made in the mid-nineteenth century in Britain, until the Revised Code 1862 knocked then on the head. In the United States between 1896 and 1903, John Dewey was advocating co-operative teaching, and used the phrase “co-operative social organization” to include both teachers and pupils. Dr. Montessori proposed that children should be grouped in a flexible manner in order to allow both small group instruction and for independent study. (p. 1)

The following are some other threads of influence that have led to the current situation.

Polos (1965), one of the early writers on team teaching, sums up the origin this way.

The term itself may be new, appearing in educational literature around 1957, but the Platoon School, the Winnetka Plan, and the Pueblo Plan all contained some of the characteristics of the modern team teaching concept. Perhaps this is why historians are fond of the line in Ecclesiastes which reads: “…and that which is done is that which shall be done: and there is no new thing under the sun”. (p. 3)

The Pueblo Plan began in 1898 and “…was organized on a multi-track basis. Standards were established for each grade, and tracks were developed which required different rates of progress depending upon the abilities of the student” (Shaplin, 1964 p. 47). The Platoon School, another early attempt to reorganize the factory-modeled school into a pupil oriented program, was developed by Wirt in 1900, and also known as the Gary Plan. It would later be adopted in the Dual Progress Plan, which again is a systematic plan to group students and work on “cultural imperatives” or core subjects and “cultural electives” or electives. The Winnetka Plan developed in the 1920s had similar aspects to the Dual Progress Plan and “…emphasized individual rates of progress through the successive stages of the curriculum” (Shaplin, 1964, p. 45-47).

...In the early 1900s, a progressive alternative to “factory model” secondary schools received accolades from educators and the press. Designed by Helen Parkhurst, a teacher who had experience with Maria Montessori’s ideas about
preschool and elementary education, this approach to secondary education was known as the Dalton Laboratory Plan because of its origin in a Dalton, Massachusetts, high school in 1921. (Edwards, 1991, p.399)

The Dalton Plan was an attempt to restructure the American high school by changing the school day into study labs and allowing students to develop their own study schedule. All of these were attempts to reorganize the way students were grouped for instruction and marked the beginnings of the non-graded school. In reorganizing students who had traditionally been isolated into graded classrooms, teachers began to use other forms of grouping themselves, such as teaming and cooperative planning.

The 1930s and 1940s saw a number of other educational projects that added to the impetus to utilize team teaching. Core curriculum is one of them and had its roots in the Dual Progress Plan and Platoon system. Arhar (1992) states:

Interdisciplinary teaming has its historical roots in the core curriculum of the 1930's. The core curriculum was an attempt to break down the so-called artificial barriers between subjects through curriculum integration and provide teachers with the opportunity to know their individual students. To accomplish these ends, core curriculum enthusiasts advocated block scheduling and joint planning time for teachers. The focus here is the social organization of students and teachers into teams rather than curriculum organization. (p. 139)

Another example is the Cooperative Group Plan created by Hosic in which "...small groups of teachers together organized the work for a group of children within a range of not more than three grades..." (Dean, 1961, cited in Polos 1965, p. 3-4). The extensive Eight Year Study reported that some of the thirty high schools "...experimented with organizational patterns similar to team teaching..." (H. S. Davis, 1966, p. 12).

However, it was not until after World War Two that the conditions were right for a very concerted effort to experiment and develop team teaching strategies. This period was "...one of crisis, confusion of goals, controversy, and reassessment, with the emergence in the second decade of a variety of approaches to the improvement of the quality of education, among them team teaching" (Shaplin, p. 24). He cites a shortage of qualified teachers, schools forming into larger units, new curriculum standards, new ways to group students, and advances in the technology of education as direct influences (p. 24-55). Bair and Woodward (1964) also suggest that the explosion in knowledge, especially in the scientific area and new understandings of child growth, promoted the move toward the use of team teaching (p. 3-11). Polos (1965) notes that
the use of teacher aides in tandem with teams of teachers was a way of dealing with the teacher shortage (p. 2-3) but the "jumping on the bandwagon" routine of some educators also led to an increased interest in team teaching (p. 6-7).

**Major educational movement.**

If a date had to be chosen from among many when the concept of teaming crystallized it could be September, 1953 when Professor F.S. Chase of the University of Chicago published an article in Saturday Review in which he stated that excellent teachers were scarce, and that therefore they must be used more effectively and wisely. Chase recommended that there be teaching teams, including non-professional aides, to be chaired by these exceptional teachers. (Edmonds, 1973, p. 1)

Extending the belief that team teaching was not simply a way of putting an end to the teacher shortage, as Professor Chase had mentioned, Francis Keppel and Judson T. Shaplin worked at setting up some practical projects to research team teaching. “Though his years of leadership in implementing this concept, Dr. Robert H. Anderson, Professor of Education, Harvard Graduate School of Education, has come to be regarded by many as ‘the father of team teaching’” (Blair and Woodward, 1964, p. v). He was the director of the Franklin School Experiment, an early example of studies in team teaching, and described the experiment as “questioning the status quo” (Polos, 1965, p. 4-5). It was part of the Commission on the Experimental Study of the Utilization of Staff in the Secondary School that sponsored experiments in 100 schools in 1956. The Lexington Team Teaching Programme in 1957, at Franklin School in Lexington, was a joint project among the Harvard Graduate School of Education, the School and University Program for Research and Development (SUPRAD) and financed by the Ford Foundation (Freeman, 1969, p. 23). This project would expand to other schools by the 1960s.

At the same time, J. Lloyd Trump had been appointed the administrator of the Staff Utilization Commission, which was sponsored by the National Association of Secondary School Principals (NASSP) and funded by the Ford Foundation. He published *Images of the Future* in 1959. It was a book which would influence many educators and “…stimulated sufficient momentum of interest among teachers and administrators” (H. S. Davis, 1966, p. 12). Another example of a program developed to study team teaching was carried out in Claremont, California at its Graduate School and included partnerships with several public schools (Polos, 1965, p. 5).

This early flurry of activity in the research and development of team teaching was indeed unique. In fact Shaplin (1964) stated, “the term team teaching is such a new addition to the
vocabulary of education that it did not appear in The Education Index until 1957-1959 (Volume II)” (p. 4). “In 1958 team teaching was barely mentioned in the annual collection of these reports: only one school system appeared to have developed a team teaching project during the 1956-1957 period reported. In contrast, in the 1961 annual Bulletin more than half of the reports specifically mention team teaching” (Shaplin, 1964, p. 3-4). As the interest in team teaching, reflected in the plethora of publications, was reaching its peak in the 1960s, the open classroom movement was beginning.

In 1964 the Canadian Education Association surveyed 57 major school boards to determine their involvement in team teaching. “At that time it was learned that team teaching try-outs were under way or were planned for the very near future, in 26 of these school systems” (Edmonds, 1973, p. 4). As well, the Hall Dennis Report (1968), Living and Learning, indicated the significance of team teaching as “the latest, and potentially most far-reaching, of the plans to make maximum use of the special resources of each teacher” (p. 144).

In Britain after World War Two some teaming occurred in the “infant schools” and “...grew from considerations of space and school layout” (Freeman, 1969, p. 359). But there would be little attention paid to it until the late 1960s. “Team teaching began in the USA in the mid 1950s. Twelve years later it was difficult to find data on team teaching in English conditions” (Freeman, 1969, p. 8). It was Freeman who would make a complete survey of the situation in England. “Team teaching reached England in the early 1960s and it was in the schools rather than the universities that it first took root” (Warwick, 1971, p.16-17).

But, as stated earlier in Great Britain and North America, as team teaching was beginning to lose its appeal as the latest education miracle cure, the open school movement was providing an appropriate arena for team teaching. In fact, Brunetti, Cohen, Meyer, and Molnar (1972) state “initially, open space was a simple modification of the self-contained classroom that was developed to accommodate team teaching”. However, within two or three years all across the United States new elementary schools were being constructed with open design and were “reported in various areas of Canada, particularly in British Columbia and Ontario” (p. 86).

Open School Movement

The origin of the open school movement of the 60s and 70s is not a single taproot but a tangle of supporting roots or rhizomes. If the open school movement has a main root, it would
have to be located in the progressive ideals set out by educators like Dewey and their reaction against traditional schooling and the early efficiency movements advocated by Taylor and Bobbitt. As Noddings and Enright (1983) state, the fundamental idea of open education is not new, but “...belongs to an old, old family, and it is to be cherished as a sign that the heritage is intact and considerable” (p. 188). As a result they suggest that the open school movement is a movement based on a model having deep theoretical basis. “There are many family portraits on the walls of our open corridors. Among them, we surely find Comenius, Froebel, Pestalozzi, Rousseau, Montessori, Whithead, Dewey, and Piaget...” (p.188).

Of the many rhizomes in the open school root system, one grew out of the work of early educational thinkers who wished to move away from the self-contained graded classroom of the early 1800s. Linked to Horace Mann among others, this factory model of education emerged in the context of the Industrial Revolution (R. H. Anderson, 1992). However, self-containment and the isolated teacher format continue to be the norm and survive into another century.

Educational alternatives such as Dewey’s Chicago schools, George Stoddard’s Dual Progress Plan, and Helen Parkhust’s Dalton Plan are examples of alternate programs started in the first half of this century (Edwards, 1991). They refuted the traditional view of the graded, lock-step movement of students and recommended continuous progress, not retention, of students. Their programs continued for a few decades without becoming mainstream.

Another influence on the open school movement came earlier in the century from Germany. Peter Petersen, from the University of Jena was implementing school programs that were the pre-cursors to openness. His ideas along with those of Susan Freudenthal-Lutter would become part of the Dutch Jenaplan Movement, which spread to both England and the United States (Anderson, 1992). In the 1950s and 1960s a style of school known as the British Infant School captured the attention of a group of educators in New England. Subsequent visits and studies of these open style primary schools led to their counterparts being implemented in North America (R. H. Anderson, 1992; Barth, 1972; Rothenberg, 1989). These “infant” schools were

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8 With the growth in numbers of students and large-scale urban development, “Educators found it easier to manage increased numbers of students by organizing them into grades and age divisions. Other factors, such as the advent of graded textbooks, state-supported education, and the demand for trained teachers, have further solidified graded school organization. The graded school system was largely a response to a need for managing large number of students rather than an effort to meet individual student needs (Kentucky Education Association and AEL, p. 7, April 1991).
the result of the work of D. E. M. Gardner, an English educator who reported the results of testing during the 1940's and 1950's (Barth, 1972). The ideas of Maria Montessori and Jean Piaget were also very evident in these English schools (R. H. Anderson, 1992, p.5; Goodlad and Anderson, 1987, p.xxiv; Noddings and Enright, 1983, p.184). The tenets of the British program would become the basis of implementation in North America\(^9\). The British programs were identified under many names, “free day, integrated day, integrated curriculum, child-centered classroom, developmental classroom, Leicestershire plan or method” (Barth, 1972, p. 9) and “...progressive education, informal education, free school, open space school, open corridor school, integrated day plan, alternative school” (Giaconia and Hedges, 1982, p. 580).

The Leicestershire plan\(^10\) was an example of the open education movement at the secondary level. It was “…developed out of an experiment begun in 1957 and initiated because of the widespread public and professional unease about the fairness of the process of selection of children for secondary education at the age of eleven plus” (Fairbairn, 1980, p. 1). In middle level schools innovations implemented included the use of disciplinary teams (design, movement, humanities), remedial teaching staff and resources centers; and the introduction of tutor groups that remained together for three years to help prepare adolescents for the upper school. These changes at the middle level were an attempt to improve the skills of the students and protect them from testing at the upper schools. The use of tutors as part of an educational guidance or pastoral system (Stokes, 1980, p. 13-29) and the use of team teaching in the subject areas to create an interdisciplinary focus aimed to improve student skill development. Inflexible periods were replaced with one-hour modules or a form of blocking. Individual study was also an area of development (Heatherington, 1970, p. 106-111). A second phase of this plan, which began in 1970, was influenced by the middle school philosophy and will be described in the next section.

Noddings and Enright (1983) provide a snapshot of what open education looked like. They use five descriptors. The stae learning is interactive and experiential, continuous and non-graded, unbounded and constructivist, social, and “transcendent” (p. 184-188). Traub, Weiss, Fisher, Musella, and Khan (1976) indicate that open educators were concerned with students’

\(^{9}\) These programs were implemented at the elementary level.

\(^{10}\) This refers to a comprehensive educational plan implemented in the county of Leicestershire, England.
experiences and stated that open education should provide students with an opportunity to engage in:

... a number of different types of activities: to explore their school environment, to make decisions about their own learning, to work at their own pace, to follow their own style of working, to learn from concrete experience before being expected to make abstract generalizations, to make errors – presumably without fear of censure - and to be helped in learning from them. (p. 1)

They conclude by suggesting that open schools emphasize the following: flexible teaching procedures and developmental learning, innovations in school programs and technology for individualized instruction; non-graded or continuous progress; team teaching; use of para-professionals; a physical environment featuring flexibility and openness; and parental involvement in affairs and activities of the school (p. 1-3).

Other authors such as Barth (1969), Goodlad and Anderson (1987), and Pavan (1992) all have their own descriptions of this diverse movement. However, the use of this multitude of terms, along with the many different models of implementation, would lead to difficulties in evaluating the programs. In fact, the blanket term, “open schools”, would be used to identify some programs and schools that did not even follow the original underlying principles of open schooling (Giaconia and Hedges, 1982, p. 579). Weiss, Friendly, Traub, and Wain (1973) indicate “the use of different terms to describe the innovations in openness underlies a very real problem facing educators; to understand the nature of the innovation” (p. 1). It would be one of the factors that led to the decline of what was considered a promising innovation. “The identification of general effects for open education is complicated by the fact that open education is not a single, well-defined treatment” (Giaconia and Hedges, 1982, p. 579). Hager (1990) called it a “jargon calamity” and suggested “those who use the word ‘open’ in a profane way” helped create confusion and mistrust (p. 1).

Traub et al. (1976) also found it challenging to measure the effectiveness of the implementation of open schools. It was difficult to “...distinguish clearly between openness of architecture and openness of program”(p. 61). As well, program evaluations attempted to measure affective domain goals, which are difficult to measure quantitatively but are one of the main tenets of an open program. “Confused research helped prevent open education from justifying its existence” (Maling, 1990, p. 23) and as Rothenberg (1989) stated, “the term ‘open’
was often confused with the arrangement of walls and furniture, and many people thought the open classrooms were unstructured environments” (p. 69).

Other difficulties resulted from poor implementation of “open” programs. R. H. Anderson (1992) outlines some of these difficulties: teachers “addicted to the practice of working in isolation”; an uncoordinated national approach; “ignorance of history” of the underlying theories; “self-aggrandizing tendencies” of certain innovators or bandwagon jumpers; and the “stranglehold that textbooks seem to have on teachers” (p. 7-8). Other obstacles included the fact that many educators were locked into the procedural and psychological pattern of “gradedness”; there was inadequate attention paid to teacher education; and, in many cases, insufficient funding and rapid leadership turnover effected continuity in implementation. All of the above factors contributed to its decline in popularity among public educators. McDonald (1993) argues that “historical reflection indicates that rarely have open-education theory and open-education practice come together in praxis” (p. 279).

Another factor that significantly hampered the success of the open area movement was the apparent lack of accountability, specifically the inability to demonstrate the students’ attainment of cognitive skills. There seemed to be a wide gap between promise and performance. Glickman (1990) reviewed the report card of open education and states that it “…gave educators choice with little responsibility” (p. 41). Maling (1990) believes that the “…research findings were highly inconclusive, mainly because researchers had no ‘standard’ open classroom by which they could measure target classrooms” (p. 20). She cites John Adams High School in Portland as one poor example that received considerable national attention. This kind of example helped sway the tide of sentiment against open education, even though many programs continued to be successful. Much of this history is reminiscent of what would happen over three decades later at Jubilee School. At the time, little about the history of open schools was known to the staff at Jubilee School but, for some parents and former teachers, who would lobby against the large group classroom, memories of open schools were not positive and many saw our project as an open school.

Although the open education movement ground to a halt, the model and much of the underlying education philosophies are still vital and influential today (Nodding and Enright, 1983). In fact, McDonald (1993) suggests that outcome-based education (OBE), co-operative learning, constructivist classrooms, and multi-age and continuous progress classrooms can all be
viewed as part of open education's legacy. Goodlad and Anderson (1987) suggest, "the strong movement away from the literal junior high school and in the direction of 'middle school' has been one of the most positive forces on this trend" (p. x). This certainly was evident in the case of the Jubilee School project. R. H. Anderson (1987) provides a concluding comment about the effect of the open school movement's attempt to knock down the walls that separate teachers from students. He states: "the lessons of over a century's efforts to find more humane and effective options to gradedness, ... efforts to break away from the 'lone-wolf' approach to teaching... have lost momentum. Some recent studies, however, suggest that nongradedness and teaming remain alive" (p. 45). The story told in this thesis stands as evidence of the extent to which nongradedness and teaming are alive.

**Team Teaching: 1970s to the Present**

In a study conducted to determine the effectiveness of teaming, Lueders-Salmon (1972) states:

In all of the open-space pods, which the writer visited, the teachers either formed one team together or divided the group into sub-teams. The writer did not see any such pods in which there was no teaming of teachers at all. However, what was considered to be "teaming" varies greatly, and ranged from almost continuous cooperative teaching to a type of shared labor through departmentalization or specialization. (p. 2-3)

In fact, this individual or specialized interpretation of team teaching would lead many people to view teaming skeptically. George and Alexander state that:

...team teaching, as it was envisioned in the 60's, was basically a hierarchical gradation of faculty members' roles and titles wherein a master teacher had major responsibilities for planning and presenting lessons to large groups of students, who are then dispersed to small seminar-size groups, led by presumably less competent faculty, for discussion and review of the lesson presented by the master teacher. Quite naturally the impression gained is one in which the essence of teaming is expressed in the act of instruction. (1993, p. 249)

As the criticism began to grow concerning team teaching and open-space classrooms, much of it deserved, the climate of education began to swing back toward single teacher classrooms. Goodlad and Anderson (1987) observe "the 1970s witnessed the beginning of a return to the traditional ways of thinking about schooling from which we had sought to depart" (p. x).
As the loss of confidence in open-space education spread, the idea of team teaching was being redefined and adopted by another movement which was trying to reform the education of adolescents in junior high schools. It was the birth of the Middle School Movement. "In the late 1960s, at the same time Alexander and Eichhorn were writing major books on middle level schools, William Georiades was expanding the concept of team teaching to include block scheduling, flexible grouping, and integration of subject matter" (Clark and Clark, 1987, p. 1). As George (1983) developed his theory of middle level education, he came to the conclusion "...that team teaching and interdisciplinary team organization are not synonymous" (p. 75).

The concept of team teaching has in the last two decades taken on new life; it has found a new home in the concepts of interdisciplinary team teaching at middle schools. The National Middle School Association endorsed the interdisciplinary team organization as a foundational grouping in schools. In 1989, a report sponsored by the Carnegie Corporation's Council on Adolescent Development and compiled by the Task Force on Education of Young Adolescents (1989) was published. Turning Points: Preparing American Youth for the 21st Century called for the creation of "small communities for learning" and identified the key element as "students and teachers grouped as teams" (p. 9).

A number of studies have followed the Turning Point report to determine the situation in middle schools. An issue of Phi Delta Kappan was devoted to middle school education and articles by Epstein and Salinas (1992) and MacIver (1990), which surveyed a significant number of middle schools, discovered that team teaching was still not the norm (less the 50% of students received instruction from interdisciplinary teams). In 1996, the National Association of Secondary School Principals published the results of a survey, Leadership in Middle Level Education. In the section on teaming, Valentine, Clark, Irvin, Keefe, Melton (1993) report that "teaming is becoming the norm, rather than the exception, in middle level schools" (p. 50). The percentage had increased to 57%, which was certainly an improvement from what Epstein (1990) and MacIver (1990) reported at 42% and Alexander and McEwin (1989) at 33% (p. 50). Again the surveys seem to focus on incidents of team teaching and not necessarily on whether the actual teaming was within the definition that George and Alexander (1993) had suggested for middle schools. In fact, determining what is meant by team teaching has always been a challenge to researchers. R. H. Anderson (1987) observed that "...efforts to break away from the 'lone-wolf'

11 From this point on this document will be referred to as Turning Points.
approach to teaching,” as outlined in preceding short history of team teaching, may have “lost momentum” but teaming remains alive. The Middle School is certainly an area that does continue to utilize interdisciplinary team teaching.

**Interdisciplinary Team Teaching and the Middle School**

As the 1970s came to an end and the open-school movement was losing its momentum as more educators became disillusioned with it, the interest in team teaching also began to decline except as it was being implemented into the Middle School Movement. Here, the term team teaching had become:

...a misnomer. A better titular description would be team organization or team planning. A major problem with team teaching is the tendency for the teachers comprising the team to “turn” teach rather than team-teach. This practice has done much to diminish the positive effect that cooperative-collaborative teaching and planning has on the improvement of instruction. (Kindred, Wolotkiewicz, Mickelson, Copein, and Dyson, 1976, p. 161)

While the hierarchical style of team teaching was losing favor, the “cooperative”, “synergetic”, “interdisciplinary” style was gaining acceptance in the middle school context. Organizational theory was influencing the definition. Muzi (1980) defined it as “…a group with flexible structure composed of students and teachers, the criteria for whose composition correspond to a multiplicity of ends that are not, however, predominantly related to the objectives of teaching and, furthermore, do not coincide with those from which the school organized in separate classes traditionally takes its inspiration” (p. 22). A focus on students was being used to conceptualize the process of team teaching.

The interdisciplinary team organization was beginning to be redefined in the middle school movement. George (1983) saw the need to not only emphasis the relationship with the teachers in the team but the students. He states:

teachers and students share, first of all, each other. The teachers on the team all teach the same students, and the students on the team have the same teachers in the basic academic program. Teachers and students also share, to the degree possible, the same basic physical area of the school and the same schedule. Without this organized sharing, there is no team, and without the team, the opportunity for a sense of community is lost. (p. 75)
Clark and Clark (1987) emphasize this difference in focus in two views of interdisciplinary team teaching. One view sees the "emphasis of the team is more on planning", while the other view emphasize "...team teaching as a strategy to increase the variety and flexibility of instruction" (p. 2). Another critical view of the use of the term interdisciplinary team teaching indicates, "...far too many teams are nothing more than interdisciplinary departments with subjects as the primary focus. In these 'teams in name only', quite often there is minimal attempt at integrating curriculum" (Capelluti and Brazee, 1992, p. 14-15).

In Exemplary Middle School, George and Alexander (1993) outline a definition that seems to capture the term 'interdisciplinary team teaching' in at least the realm of middle schools where most team teaching occurs:

...a way of organizing the faculty so that a group of teachers share: (1) the same group of students; (2) the responsibility for planning, teaching, and evaluating curriculum and instruction in more than one academic area; (3) the same schedule; and (4) the same area of the building. (p. 249)

The evolution of team teaching as a practice that views the relationship of the members of the team and the interconnectedness of all the elements as important seems to be the signature of the emerging view. George and Alexander (1993) go on to emphasize this importance: "These four factors [mentioned above] are the necessary and sufficient elements of interdisciplinary teacher organization. When all four are present, nothing else is needed; when one or more elements is missing, the team organization is less than complete. Interdisciplinary team teaching is not a critical element of the exemplary middle school; interdisciplinary team organization is" (p. 249).

In middle schools Hanslovsky, Moyer, and Wagner (1969) state:

Opportunities are greater in team-teaching because the necessary ingredients for flexibility are inherent. The scheduling of teachers with time and students in common is the crucial factor differentiating this organizational pattern from the traditional classroom. ...In the interdisciplinary approach to team teaching, curriculum provides the fabric upon which different disciplines using different colored threads weave their kaleidoscope of color into a tapestry. (p. 27-28)

More recently, research on team teaching in education has been predominantly connected to studies done at the middle school level. Such studies indicate "...that proper use of the interdisciplinary team organization does, in fact, increase the sense of community experienced by middle school students" (George and Alexander, 1993, p. 253). Arhar (1992) researched interdisciplinary teaming of middle level students utilizing social bonding theory. She concluded,
"...teaming creates conditions that are directly related to student social bonding. It reduces isolation and anonymity; it allows teachers to know their students quite well; and it permits teachers to "gang up" on students in positive ways to affect their learning" (p. 157). Plodzik and George (1989) add that it is, "...an environment that is generally regarded as more personally enriching and satisfying to its middle school teachers and student members than other organizational strategies" (p. 17).

Capelluti (1991) explored adult learning and organizational theory as part of the middle school team teaching rationale. She sees the interdisciplinary teaming in middle schools as beneficial for teachers, which in turn benefits their students. She lists three beneficial outcomes to working in teams: "people need a structure that allows for flexibility, creativity, and accountability"; "professionals need control over their destiny"; and "working together rather than in isolation leads to greater productivity" (p. 9). This is certainly in the spirit of the Task Force's report, Turning Points (1989), that called for the empowerment of teachers and administrators in order that they might "do what is best for students" (p. 58).

A study on middle schools by the Australian National Advisory Committee (1996) entitled From Alienation to Engagement: Opportunities for Reform in the Middle Years of Schooling report that "teachers found that working in teams created opportunities for professional review, action and reflection. Cooperative planning and development produced positive results including the combining of teachers' strengths, the overcoming of professional isolation and the building of student-teacher relationships" (p. 5). Johnston (1991) summarizes the research results:

From hundreds of scientific and quasi-scientific studies that have been conducted on middle level schools, there are a number of things we can state with some certainty. First is that interdisciplinary teaming works at the middle level, at least as well as other practices, and probably better than most. There is evidence that teaming improves the sense of bonding and commitment that students have towards school, thereby reducing the likelihood that they will drop out or fail to abide by group norms (Arhar, 1990). Furthermore, there is increasing evidence that interdisciplinary teaming has beneficial effects on student performance on standardized achievement tests (Arhar, Johnson, and Markle, 1988:1989). The most compelling evidence for teaming, though, is probably found in the fact that it improves teachers' sense of efficacy and effectiveness. Teachers who work on teams report more satisfaction with teaching, a stronger tendency to remain in the profession, and a greater sense of success with individual students. (p. 50)
Thornton (1998) summarized the current feelings about the benefits of interdisciplinary team teaching, “For us, learning shifted from the all-knowing teacher “giving” students knowledge to people coming together with different strengths, experiences, levels of expertise, and knowledge to learn together. We all contributed to the dialogue of complex thinking and authentic learning” (p. 34).

Another influence on the definition of team teaching that I would like to explore is its relationship to organizational behavior. I have basically outlined the educational thinking of the times and realize that many educators have been influenced by organizational theory. There is a move to view the advantages as part of the relationship that develops between members of teams in organizations, and in the case of schools between the teachers on staff. In The Fifth Discipline: The Art & Practice of The Learning Organization, Peter Senge devotes a chapter to team learning. He views team learning as interconnected to the other disciplines of a learning organization. The four disciplines outlined by Senge include “personal mastery”, “mental models”, “building shared vision”, and “team learning”. He states: “team learning is vital because teams, not individuals, are the fundamental learning units in modern organizations” and “when teams are truly learning, not only are they producing extraordinary results but the individual members are growing more rapidly than could have occurred otherwise” (p. 10).

The change in perspective from team teaching to team learning is significant. Like Senge, I believe that this is the direction effective organizations in general and schools in particular must follow in order to deal with the complex issues of the future. Senge stresses that “team learning is a team skill” and “learning teams learn how to learn together” (p. 257). I will return to Senge’s thoughts in the final chapter as I reflect on the experiences of the Jubilee teams and their journey into a learning organization. Notably, his ideas were being read and discussed as part of the restructuring efforts in the Yellowhead School Division, to which Jubilee School belongs. The Curriculum Director, John Martini, introduced Senge’s ideas into all aspects of his work and shared them with the administrators of the district. The influence of Senge’s ideas can be seen most vividly in the changes to the administrative structure and the strategic plan of the division. At Jubilee, we took on “teamness” wholeheartedly and Senge’s influence is evident in this respect.
I have compiled a list of advantages and disadvantages of team teaching. I have divided them into two lists because of the different goals and emphasis in each era. They are laid out for the period of 1950 to 1970s in Appendix C and 1980 to 1990s in Appendix D.

The present organizational use of teams, or at least the concept of “teamness”, has not diminished. In fact, it seems to have undergone a resurgence in political, corporate, and medical organizations. Examples include campaign slogans that entice voters to “join our team”. I recently heard of a police “Break and Enter” team used in Edmonton to combat crime. Medical teams seem to be “all the rage”. In schools, however, the use of “teamness” tends to be limited to planning, not the actual act of teaching in front of students. There still seems to be a lack of confidence in the benefits of this form of organization. However, the middle school movement did develop out of the marriage of the open education movement and team teaching. It was also influenced by a growing concern among educators over the inability of the traditional junior high school to deal with adolescent needs.

**Middle School Movement**

It would seem that the genetic source of secondary schools in North America, which include junior highs and middle level schools, spring from a murky, historical well spring. In particular, the subject-disciplined, lock-step grade system of high schools has its foundations in the Committee of Ten on Secondary School Studies’ published report of 1893. The committee was chaired by Charles W. Eliot, President of Harvard University and the thinking at that time was based on “faculty psychology” which saw learning and building mental capacity as akin to a physical exercise insofar as it was assumed that mental work also requires discipline and hard repetitive work. Following the Yale Report of 1828, the structures of secondary schools would be based more on administrative convenience and college entrance requirements than on the needs of students or teachers. As Pinar, Reynolds, Slattery and Taubman (1996) suggest, “…secondary school curriculum is the ‘tail’ on the ‘dog’ which is the college / university curriculum” (p. 76). The Committee of Ten focused on administrative issues such as course length, age of students, grade sequence, and “the arbitrary character of these administrative organizations becomes hidden in their commonsensical appeal” (p. 77-78). Although there have been other influences on secondary education, these early ideas remain the bedrock of our current schools and some might say the cement which prevents reform or transformation in secondary schools a century later. As
early as 1937, Harl R. Douglass, in his report entitled *Secondary Education for Youth in Modern America*, observed, “since 1900, school people have been particularly interested in two important educational developments: (1) the scientific movement, and (2) the administrative development”.

“Workers in secondary education must be rescued from the treadmill. As individuals they are relatively helpless in the grip of a machine which is controlled only by its momentum” (p. 15). In the case of lasting reform the pace of change has been glacial.

Another major influence to emerge from the early history of secondary schools was the progressive movement, as outlined earlier. Again there is no easily determined starting point but it would appear as if the ideas of the Herbartian movement refuting the classical ideas of memorization and mental discipline, seem to be one starting place. The movement that Herbart started would elevate the concept of curriculum in educational theory and in educational debates (Pinar et al. 1996, p. 81-83). These ideas were transformed and mixed with the “child-centered” and “humanistic” philosophies of Colonel Parker and Stanley Hall, each considered transitional influences to the Progressive Movement (Pinar et al., p. 78-90). Their influence has been predominantly on the elementary curriculum, while secondary schools remained “academies”. In reality, it wasn’t until the 1930s that secondary education became more universal, for up until that time most children only completed elementary school or grade eight.

By 1903, Dewey was arguing for a reorganization of grades. “Eight years of schooling for elementary students was too long, he observed, in view of his belief that youngsters required at least six years of secondary education to develop the civic competence and social understanding necessary for full democratic participation in modern life” (Fleming and Toutant, 1995, p. 32). In fact, the promotion of the middle level grades would become a main tenet in the progressive movement. Progressives saw the need for a transitional school. They claimed that the organization of traditional schools was, “unsupported by psychological research and ignored youngsters’ developmental needs” (p. 32). Many educators felt that junior high schools should become places for transition, exploration and development of the pre-adolescent and the adolescent. But as we shall see, the traditions of the high school would be too strong too break away from. Major influences of the time came from the experimental science and social efficiency movements associated with Thorndike, Taylor, and Bobbitt.

It was in about 1909 that the junior high school was born (Pinar et al., 1996, p. 93). According to George, Stevenson, Thomason, and Beane (1992) there were a number of factors
that led to its development and they seemed to come together all at once. These factors included students dropping out of school before grade eight and thus missing out on classical subjects and grade eight students being considered too old for elementary schools. Some elements of the efficiency movement believed that it would also be a better way to sort children for further education or work. Finally, there was a belief that high schools were becoming overpopulated (1992, p. 84). Thus, over the next three decades the institution of a separate junior high school became permanent. As the result of the work of educators like William Gruhn, "the father of the junior high movement", an established system had developed by the late 1950s that saw the majority of students go "...through a pattern of six years of elementary school, three years of junior high, and three years of high school" (Cawelti, 1988, p. 2).

In Canada, a similar pattern of development occurred and by 1920 "...two junior high schools had been opened – one in Winnipeg and one in Edmonton" (Fleming and Toutant, 1996, p. 32). As in the United States, by the 1950s the Junior High School was popular across Canada. However, this would be its zenith of growth. By the early 1960s, there was a loss of confidence in this middle years experiment. There was a multitude of reasons for the critique, none more important then the fact that junior high schools had not really effectively dealt with the development of adolescents. Educators in junior high schools had failed to define its role and were left in the middle to make adjustments to programs which were left over from the traditional programs of the elementary and high school (NASSP Committee, 1983, p. 5). As well, many school administrators and teachers (some that had been forced to move down to the junior high school with the movement of grade nine students) saw the middle level school as a "junior" high school, a mini- replica of the senior level.

Other events such as the launch of Sputnik and the resulting disillusionment of the North American public with science and mathematics education, racial tensions, and changes in population dynamics, all led to a rethinking of middle level education (Eichhorn, 1991, p. 2). But mostly junior high schools became more and more like high schools in every way.

Teachers were organized in academic departments (as they were in the high schools and the universities and at Harvard), rather than in the interdisciplinary core curriculum groups that the literature of the junior high school recommended. Students were promoted or retained on a subject-by-subject basis. Elective programs focused on specialization that would lead to quasi-majors at the high school rather than the exploration envisioned by other early junior high school educators. Rigid grouping patterns based in perceived ability (measured by I.Q.)
or prior achievement became characteristic of the junior high school in many districts. (George et al., 1992, p. 4-5)

Junior high school was seen as a way station between elementary school and the more important education of the high school.

In the end, the junior high school was seen to fail on all fronts. It hadn’t succeeded in effectively articulating students from elementary through high school. It didn’t deal with the adolescent in a psychological or developmental way. Nor did it improve the students academically. What was the solution? What was next? If the development of junior high schools seemed clouded under many influences, the origins of middle schools are certainly as hazy. As the turbulent years of the 1960s began, so too did the turmoil in middle level education. Social forces were influencing the organization of schools. Movements toward racially desegregated schools and school reorganization were seen as a means to this end. The “baby boom” was in full force and elementary schools were bulging. In contrast, high schools had plummeting enrolments. As with the development of junior high schools, a fluctuation in school age population led to some convenient moves. The publication of A Nation at Risk in 1983, which proclaimed the American education system a failure and called for stricter and higher standards, added to these social pressures. One solution was to send grade nine students back to the high school in an effort to, “get them ready for academic subjects”. The resulting turmoil seemed to create fertile ground for the development of schools in the middle (George et al., 1992, p. 7-9).

One other factor that seemed to influence public educational thinkers at the time was research on adolescents. A book by Tanner (1962), an English physician and medical researcher, indicated, “...that biological maturity was occurring earlier by four months per decade” (cited in Eichhorn, 1991, p. 3). As the development of middle level education continued, more research and thought was put into understanding the needs of this group of students caught between childhood and adulthood. The fact that defining and describing this group of students was problematic led to difficulties in both implementation of programs and in research itself. As Fleming and Toutant (1995) state, “…the middle-school movement, as it took form in the 1960s evolved both in reaction to – and as an outgrowth of – the earlier junior high school movement” (p. 35). At the same time, the open schools movement began to lose its credibility, especially in terms of accountability. As George et al. note “open spaces for learning had been walled up, and
innovative designs for curriculum and instruction had been packed up-apparent casualties of the ‘back to basics’ movement" (1992, p. 118).

The terms and concepts of middle school or middle education were already being used in the 1960s. In 1965 William Alexander was calling for a school in the middle and the first were being opened up across the United States (George et al., 1992, p. 6). Clark and Clark first used the term “middle level" in a 1981 study. In the early years, there had been disagreement and misunderstanding about the use of the terms “junior high" and "middle school" but by the 1990s a general consensus was being established (Valentine, Clark, Irvin, Keeffe, and Melton 1993, p. xv). However, for some educators the only change that has occurred is in the name. Middle schools were put forward as a better way to provide for adolescents. As Lounsbury contends:

However, in terms of curriculum - the content itself - relatively little has been done. In fact, the very problem with the junior high school often were compounded by the middle school as it took over the sixth grade and proceeded to departmentalize it, treating it much like another secondary grade. Many, if not most, early middle schools were really junior, junior high schools. Some still are. (1991, p. 14)

Whatever the problems in implementing middle schools, during the period between 1979 and 1990, junior high schools declined by 53% and middle schools increased by 200% in the United States (George et al., 1992, p. 10). They were here, and here to stay

In early 1970 the process of making changes at the middle level was being considered in England. The County of Leicestershire was in the process of changing its middle level school, which houses eleven to fourteen year olds. The plan, the second of two distinct phases, was based on the recognized needs of these adolescents. The first phase began in 1957 but by the 1970s another change began with the movement of Ten plus students to the high school (middle or junior high school). It was felt that by adding grade six to the high school teachers would be afforded more time to help students acquire the needed skills and attitudes for their time in the upper schools. This was more than the traditional belief that the middle school was the “'meat' in a British Railway sandwich” or the “'bridge' between primary and upper schools” (Illsley, 1980, p. 31). It indicated the acceptance of the middle school philosophy, which maintained that middle level students needed to have their own curriculum, reflecting their specific needs, not merely designed to prepare them for upper school (Illsley, 1980). The Ten plus group were assigned a team of teachers that oriented them to secondary school organization. The tutor group would
remain together after the first year and accompany students into the next three years as described in the earlier overview of the Leicestershire Plan.

The National Middle School Association was formed in the United States in 1973 but, as late as 1981, there was no clear agreement about what constituted middle, intermediate or junior high school. There were at least thirty-four different grade combinations, and “no other level of public education for minors so poorly defined” (Lipsitz, 1981, p. 13). By the end of the 1980s a number of national surveys, including Alexander and McEwin’s (1989) and Cawelti’s (1988), had been completed. The surveys tended to suggest that middle school organization of grades six to eight, with programs that used such concepts as teacher-advisor programs, articulation activities, interdisciplinary teaching, and block scheduling, would best be able to deal with adolescents age ten to fourteen years (George et al., 1992, p. 9-11). Other studies of middle level education, including Clark and Clark (1987), Doda, George and McEwin (1987), Epstein (1990), and Epstein and Salinas (1992), outlined the common components of a middle level school.

In order to bring some consistency in the identification of middle schools and junior high schools today, I will use the term “middle level” education to identify educational efforts and programs between high school and elementary.

This term is gaining wide use as a single descriptor for all programs that deal with all combinations of grades 5 through 9 for youngsters between 10 and 14 years of age. School districts and their communities should avoid getting locked into abstract controversies about which grades belong in the middle level school. Richard Lovelace, a contemporary of William Shakespeare, wrote in his poem, ‘To Altheas from Prison,’ ‘Stone walls do not a prison make’ nor iron bars a cage”. Nor do grades make a school. Program makes a school. (Toepfer, Lounsbury, Arth, and Johnston, 1986, p. 6)

Turning Points (1989) consolidated much of the research on adolescents and outlined eight core principles for middle level education, and called for changes in the structure and organization of middle education. The principles are summarized as follows:

1 Create small, personalized communities for learning
2 Teach a core academic program
3 Ensure success for all students
4 Empower teachers and administrators to make key pedagogical, management, and budgetary decisions
5 Staff middle-grade schools with teachers who are specially trained to teach young adolescents
6 Improve academic performance through fostering the health and fitness of young adolescents
Over the last 10 years these principles have helped to bring a sense of order to the research and implementation of middle level programs. To conclude this section on the background of middle schools I will briefly discuss the nature of the student in middle level education, the adolescent, and how this impacts middle level educational thought.

**Adolescent Nature**

"What is clear about adolescence is that nothing is clear. When it comes to adolescence, there are no pat answers and no wrong questions. If you think you have adolescents figured out, just wait a bit, because things will be different next week" (Williams and Murphy, 1993, p. 3). After twenty-two years of teaching and administering at the middle level I would have to concur with the above statement whole-heartedly. In order to bring some clarity to my discussions, I will provide a portrait of these very diverse young students as well as an overview of the societal influences many of these young people face.

The term adolescent has been used with a number of prefixes including early, emerging, young and pre due to the nature of these young people in rapid transition. They are not children anymore but they are not adults. Eichhorn (1966) uses a term “transescence”, which seems to be as reasonable a way as any to help identify this sometimes perplexing group. He further explains:

> [It is] the stage of development which begins prior to the onset of puberty and extends through the early stages of adolescence. Since puberty does not occur for all precisely at the same chronological age in human development, the transescence designation is based upon the many physical, social, emotional, and intellectual changes that appear prior to the puberty cycle to the time when the body gains a practical degree of stabilization over these complex pubescent changes. (as cited in Toepfer, 1988, p. 110)

Since this definition was coined over thirty years ago, advances in brain research have deepened our understandings of the variances in the development of young people’s intellectual ability. Our understanding of learning styles and recent work on multiple intelligence have also added to the complexity of understanding adolescent development.

Combine these complex changes to the transescence body and mind within a milieu of societal problems that young people face and you have the development of effective middle level education fraught with challenges. These societal issues include such things as changes in family
make-up (including both parents working and a greater percentage of single parent families); children spending more time alone at home and for longer periods; children changing schools more often due to increased family mobility; and students dealing with issues such as substance abuse, decisions about sex, and suicide. For young people, such societal problems mean they are forced to make decisions about complicated issues even earlier than in past decades and at an earlier ages (Brough, 1990, p. 79-81).

Elkind (1997), in an article entitled The Death of Child Nature. Education in the Postmodern World, explains that we need to consider the biological, social, and psychological aspects of the child. He believes that the “modern” view of the world, based on the unquestioned assumptions of progress, universality and regularity, is still alive and well in our education system. The need to integrate the “postmodern” critique of these assumptions is essential to the transformation of our educational institutions. He suggests that the postmodern ideas of difference, particularity, and irregularity must be considered “...to correct some of the overly idealistic and romantic views of the world” (p. 243). He explains:

The modern conception confused and merged the universal biological child with the individual psychological child. While this identification of the two different conceptions of child nature was probably necessary to the establishment of free education, it is often a hindrance to effective contemporary educational practice. (p. 245)

Another critique is the position that our schools and curriculum pay little attention to the spiritual or soulful development of students, as outlined by J. P. Miller (1999). It is even more crucial at the middle level of education that we revisit our ideas about transescence and utilize our experience along with the current research. We need to stop treating all adolescents the same and develop educational programs that can accommodate their different and unique development.

It has been stated in many of the articles that I have read about middle level education that teachers not only need to know about their students and have specific training for this level, but also need to like teaching at this level. “To truly respect teens, we must first let them in our hearts. We have to recognize the great wisdom and value each and every one of them brings to the world” (Luvmour and Luvmour, 1995, p. 60). After twenty years of teaching middle level students I agree with Healy’s (1995) statement, “The more I am around adolescents, the more fascinating I find them. Every day my students amuse and delight me – and at the same time they irritate, challenge, and exhaust me” (p. 34). It is never dull in a middle level school and it is for
these emerging adults that middle level education has changed over the last century. Attempts have been made to provide a more holistic environment that will enable them to develop into caring, self-confident, constructive citizens.

Both the history and the current status of middle level education in America are the results of a type of dynamic tension, a struggle between a philosophical commitment to improving programs for young adolescents, on the one hand, and the demands of expediency on the other. (George et al., 1992, p. 2)

The status of middle schools is a "...current debilitating mismatch between the developmental needs of young adolescents and the characteristics of middle-grade programs" (MacIver, 1990, p. 458). Or as Williams and Murphy (1993) have observed, "...the attention to organizational needs has overshadowed the importance of program content and curriculum" (p. 129). More specifically, the difficulties that cause the "mismatch" of programs to "needs" of the transescent student result from the acceptance of some tradition assumptions about curriculum. Some examples of these assumptions include:

1. if we can just find the right curriculum (read text, program, documents) our problems are over, or the answers are outside the school in the hands of experts,
2. not all areas of curriculum are as important, (read Mathematics, Science, Language Arts and Social Studies are more important than options such as Second Language, Art, Music, Physical Education, etc),
3. the curriculum can be seen as the curriculum provided by the outside authority, not the null and hidden curriculum, the view that the assignments, homework and textbooks are the curriculum and not a more holistic understanding that curriculum is greater than the sum of its parts,
4. the 'old style' curriculum was good enough for me, it should be good enough for my child,
5. curriculum is too important to leave to teachers (Capelluti and Brazee, 1992, p. 11-12).

These assumptions run against the tide of research on adolescent learning.

Difficulty in utilizing research to help in program implementation is prevalent. "Not only does the research yield information that may not be conclusive, but also the research draws conclusions from a body of evidence that 'frustrates summation'" (Johnson and Markle, 1986, p. 5). So although the Middle School Movement is well entrenched in the United States, it continues to face many obstacles. In Canada, the movement is not so entrenched. In Alberta, it was not until the early 1990s that middle schools were adopted as an alternative to Junior High Schools. However, they are still few and far between. In fact before the amalgamation of the
Yellowhead School Division in 1995\textsuperscript{12}, there were no middle schools and only one traditional junior high school (Grades Seven, Eight, and Nine) in the division, Jubilee School.

The previous historical look at the influences (progressive, open, and team teaching movements) that have affected the development of the middle level school was meant to provide a background for the narrative of the Jubilee School project to follow in Chapter Four. The next section presents a more in-depth review of the fundamental component of the changes made during the project, long-term student-teacher relationships. This history, followed by a discussion of the definition, rationale, and research findings concludes with a look at the advantages and disadvantages of long-term teacher student relationships.

**Narrow Focus Lens / Long-term Relationships**

**Introduction**

Relationships between students and teachers have been a concern of educators for as long as people have been teaching and learning in a formal situation. But as teaching became a more institutional or organizational social structure, the relationships between teacher and student became a point of research and discussion and, some would argue, the most important issue of schooling. Barth (1996) outlines the need for diversity and stability in an elementary school. He observes, “the source of most of the problems that afflict schools lies within the schools themselves – in the quality of the human relationships” (p. 219). The time and opportunity to deal with the quality of the teacher-student relationship is another matter. Most elementary students spend each day for a school year with one teacher, but this certainly is not the case in most secondary schools across North America. Ross (1984), in a study of time and school learning, observed and asked some important questions:

> For most elementary school teachers the structure of much of the school day is under their control. However, all teachers must work within various constraints when arranging their schedule. Do some teachers, in some schools, have more constraints than others? Are these self-imposed constraints or constraints imposed by other teachers, the principal, or district or state requirements?” (p. 85)

These are some of the basic questions I will address in the following review of research concerning relationships in general and, specifically, long-term relationships in classrooms. The

\textsuperscript{12} After the amalgamation in 1995, one of the towns involved had just organized a middle school.
issue of long-term and close relationships seems more acute at the middle and high school level. Students and teachers were originally divided into subject disciplines, grade levels and separate classrooms, and the relationship between student and teacher became more fragmented and specialized. In fact, Brickley and Westerberg (1990) see the difficulty of this timed and disciplined student-teacher relationship of the individual subject classroom as an impediment to improving schools. “The system of arranging learning has become an end in itself and therefore a barrier to learning. For example, it often separates people from each other and from the real word and isolates disciplines and tasks, creating problems of communication, understanding, and priorities” (p. 30). George et al. (1992) believe “the challenge becomes one of organizing time and space to accommodate the greatest number of principles and people while ensuring a bare minimum of inflexibility’s” (p. 72).

Shepro (1995) agrees. He sees the need to put reform “in the hands of professional teachers” and “… give teachers authority to call the shots in their classrooms and then we need to hold them accountable for academic results”. He also suggests we, “create teams of teachers who are responsible for teaching the same group of children for four years” (p. 43). The idea of students and teachers being together for four years would certainly concern most teachers, even elementary ones, who have students every day for a year. Lounsbury (1987) outlines this problem in more detail:

Logic would lead one to believe that the longer a person is in regular contract with another, the greater is the likelihood that one can influence the other. Yet in all but a few instances, schools are so organized that teachers terminate all their relationships in June and begin all over again with a new array of pupils in September. Putting aside for the moment the academic aspects of such complete turnovers, it is obvious that much is lost when those relationships which were a year-in-the-making are officially terminated with the final grade. Particularly when pupils are experiencing so many changes and the need for stability is present; it seems unwise to sever student-teacher relationships every 36 weeks. (cited in George et al. 1987, p. iv-v)

Oppenheimer (1990) states “young adolescents need a place where close, trusting relationships with adults and peers create a climate for personal growth and intellectual development. Middle grade organization ideally must create small learning environments, form teachers and students into teams, and assign an adult advisor to each student” (p. v).

The need to develop relationships is as urgent for teachers and students in secondary schools as it is in elementary schools. The Carnegie Foundation for the Advancement of
Teaching, in its publication *Breaking Rank: Changing an American Institution* (1996), recommends that school staffs restructure space and time for more flexible education; include “small units in which anonymity is banished”; ensure teachers have “contact time with no more than 90 students”; and “develop flexible schedules that allow more varied use of time” (p. 45). But what do educators need to do in order to implement these recommendations? Hargreaves, Earl, and Ryan (1996) conclude, “one of the most fundamental reforms needed in secondary or high school education is to make schools into better communities of caring and support for young people”. This has “…ramifications for the entire way in which curriculum and assessment in secondary schools or junior high schools are delivered”. They state, “…in the end, it is care in the classroom, in the routine relationships among teachers and students, that matters most.

Attending to these needs requires more fundamental restructuring of high school life to allow classroom teachers of early adolescents to know and care for their students better and vice versa” (p. 77).

So why have schools, in particular secondary schools, developed and maintained fragmented and limited student-teacher relationships? Long-term student-teacher relationships have been researched and found to be positive “yet despite these findings, meaningful discussion of long-term teacher-student relationships is scarce in our nation’s schools, and implementation is rare enough to be regarded as exceptional” (Burke, 1996, p. 360). Why is this? Why is the North American system, “…one of only a few education systems in the world in which students are required to rush from one period to the next in response to an unyielding academic schedule”, which in turn “…causes students to feel more like tourists in a school than like citizens of the school. And a single class period is often the sole contact students have with the teacher?” (Liu, 1997, p. 156). These and many other questions are explored in the following section that will includes a history of the research on long-term teacher-student relationships and an exploration of a definition and rationale of long-term relationships. It concludes with a summary of the advantages and disadvantages.

**History**

Unlike the topic of team teaching, the research on long-term student-teacher relationships as a distinct concept is relatively new and somewhat limited. Relationships are developed in any teaching / learning situation regardless of the duration of contact. Teachers in a single classroom,
teaching alone, will develop a relationship with their students. However, my review of the historical background of long-term relationships will be limited to specific incidents where long-term relationships are more extended, such as in non-graded or multi-age groupings, open space classrooms, block scheduling, and interdisciplinary team teaching found in middle level education. Grant, Johnson, Richardson, and Fredenbury (1996) present this historical declaration:

> Shall teachers in city graded schools be advanced from grade to grade with their pupils through a series of two, three, four or more years, so that they may come to know the children they teach and be able to build the work of the latter years on that of the earlier years, or shall teachers be required to remain year after year in the same grade while the children, promoted from grade to grade, are taught by a different teacher each year? This I believe to be one of the most important questions of city school administration. Officer of Education, Department of Education, 1913. (p. 17)

The above quotation, although made over 85 years ago, still has a ring of urgency for some educators who advocate long-term student-teacher groupings. Schools organized around grades, the ones we are familiar with, had their beginnings with Horace Mann’s influence on grammar schools in Boston in 1848, which were modeled after the Prussian system. He and other educators of the time believed that as the population in cities and towns increased due to industrial pressures of the factory system, a more efficient way of educating students was needed. Before the 1850’s little was recorded about schooling. R. H. Anderson (1992) states “it seems safe, however, to assume that prior to the early 1800’s the clientele for schools were mostly from the privileged classes, were generally heading for ecclesiastical or political careers, and were served by tutors or teachers in a relatively private and individual setting” (p. 1). As the population began to grow with large numbers of European immigrants entering North America, the question asked was “Should, in fact, the schools be expected to accommodate all of them? Many people felt it was not necessary, that since most of these children would become farmers or workers in factories, they did not need to learn to read and write” (Grant and Johnson, 1995, p. 21).

As the Twentieth Century began in North America, public schooling had organized children into one-room schoolhouses in the rural areas and the new graded grammar school in urban centers. Graded schools developed relatively quickly. "The famous Quincy Grammar School in Boston was founded in 1848. Within the next 15 to 20 years, especially in the cities, the graded pattern crystallized into the structure that almost every adult in America would
recognize from his/her own youthful experience” (Anderson and Pavan, cited in Grant and Johnson, 1995, p. 21). Still, “in 1918, there were 196,037 one-room schools, representing 70.8% of all public schools in the United States” (Miller cited in Grant and Johnson, 1995, p. 21). And, in fact, for much of rural Canada, the small rural school would be predominant until the 1950s, particularly in some parts of Western Canada. The pattern for the graded schools would become a dual system comprised of a grammar school (grades one to eight), and a high school (grades nine to twelve) (Mason, 1995, p. 202).

Certainly the changing face of North America as the Twentieth Century progressed had a profound impact on the organization of schools. Shoumatoff (1985) indicates that “…the rise of individualism and the century or more of fragmentation in human relationships that resulted from a national obsession with self-centered living that appears to have followed the birth of the new industrial America” also has influenced an acceptance of the individualized nature of graded schools (cited in George et al., 1987, p. 2). George et al. (1987) summarize:

In the same way that skilled craftsmen fell victim to the factory model and the assembly line production therein, long-term teacher-student relationships seem to have disappeared with the advent of the graded school at the beginning of the present century. When the division of labor and the assembly line began to dominate American economic life, education appears to have entered into a long period of slavish mimicry of things industrial, adopting almost in toto the factory model as appropriate for school program. Partly in response to skyrocketing enrollments, and partly in service to the needs of the new corporate America (Bowles and Gintis, 1976), school leaders have often proceeded on the assumption that the best way to produce automobiles was the best way to educate human beings. (p. 2)

The establishment of the grammar school and high school, with the subsequent movement to establish a 6/3/3 system of the elementary, junior and high school early in the new century, has lead to the self containment of the graded school and become a way of school life.

Other educators looking at developing schools from a more flexible perspective challenged this belief in graded schools. “For over a century, educators like Maria Montessori and John Dewey, who were concerned about how best to teach children rather than the logistical problems of educating all citizens in a democracy, looked at this natural pattern of development for clues” (Grant and Johnson, 1995, p. 22). A number of early attempts to educate children differently “did not successfully challenge the prevailing isolated-teacher format”. For example, “Dewey’s school promoted thinking and events that forever weakened the literally graded school,
although a century later the arrangement stubbornly persists" (R. H. Anderson, 1992, p. 2). The progressive education movement would also spawn other alternate approaches to graded schools, such as the non-graded elementary school movement.

European attempts to modify the graded system included the Jenaplan described earlier in the chapter and the Montessori school movement. Another very unique school was opened in Germany in 1919. It was developed by Rudolph Steiner for an industrialist, Emil Molt, who wished to provide education for the children of the workers at his Waldorf-Astoria factory in Stuttgart (Barnes, 1980 and Reinsmith, 1989). Although few educators in North America know much about the Waldorf School, it certainly is not a newcomer as the first school was established in New York City in 1928. Although it barely survived the Nazi governments in Germany, it is now "...one of the most rapidly growing yet least known independent nonsectarian school movements in the free world today" (Barnes, 1980, p. 323). The interesting aspect of this school in reference to long-term student-teacher relationships is that the "class teachers continue with a class one year to the next - ideally, right through elementary school. With rare exceptions these teachers lead the main lesson at the beginning of each day" (Barnes, 1991, p.53).

Other influences on establishing long-term student-teacher relationship in contrast to graded organizations in schools emerge through the infant schools in Britain and, later, the open school and team teaching of the 1950s and 1960s. In each case attempts were made to provide situations where teachers and students had opportunities to develop long-term relationships and, thus, enhance learning. The split of the high school into the junior high did not provide the needed long-term relationship for the young adolescents that had been initially intended. In fact, most junior high schools tended to become, "junior" high schools. As outlined earlier in the chapter, the middle school movement renewed interest in the need to develop long-term relationships in schools. As Mason (1995) observed, "beginning around 1960, however, dissatisfactions with traditional six-three-three or six-two-four junior high schools led to other grade level organizations and a new reform movement called middle schools" (p. 204).

The current interest in developing long-term student-teacher relationships can be traced to a number of influential documents. In 1985, the National Association of Secondary School Principals (NASSP) issued a report called An Agenda for Excellence at the Middle Level. Along with recommending advisory programs and variety of instructional methods, they saw the need to organize "...around teaching teams that plan for and work with a clearly identified group of
students, thereby assuring that every student is well-known by a group of teachers" (George et al., 1992, p. 10). The Turning Points report (1989) specifically identified the need for close relationships between students and teachers. The first recommendation states, “Create small communities for learning where stable, close, mutually respectful relationships with adults and peers are considered fundamental for intellectual development and personal growth” (p. 9). In the next year, Lounsbury and Clark (1990) published the results of a shadow study of Grade Eight students across the United States. This type of study had already been conducted in 1962, but as a follow-up to the Carnegie Report, Turning Points, a new study was carried out. One of the main findings was that, “…the fundamental importance of the teacher and the resulting student-teacher relationship must not be overlooked” (p. 139).

Although the Middle School was slow to extend into Canada, many provinces have reviewed their middle level education. In Ontario, the “Transition Years” initiatives researched the quality of the education of adolescent students, including some of the pilot studies that were being carried out. The Toronto Board of Education Task Force, in its final report (1991), recommended educators,

identify the needs of young adolescent learners in their school and incorporate in their Program Statements ways such as cooperative learning, shared planning time for thematic teaching, flexible timetables and longer instructional blocks of time, to implement and accommodate an integrative approach to teaching and learning. (p. 86)

This Task Force also recommended that schools “develop ways to encourage the partnership of students, staff and parents in building a welcoming, friendly school climate to foster a spirit of understanding and support” (p. 86). Ames and Miller (1994) recommend the need for establishing close relationships between adults and children and understand that “such relationships do not just happen by chance; the structure of the school must be designed to support such bonds” (p. 10). They recommend the implementation of “adviser-advisee programs” and “interdisciplinary teaming” as the way to develop these relationships. Despite these findings and recommendations, the issue of long-term student-teacher relationships and team teaching has been slow to be recognized and acted on. Little concrete action has been outlined as to how to build these types of relationships. One way to help understand long-term relationships is to try to explore how they are defined.
Definition

So, to a great extent, it is warranted to assert that no matter what textbooks, materials, curriculum guides, and such are employed, the teachers are the curriculum. Therefore, working out comfortable, secure, interpersonal relationships between adolescents and adults is a high priority. (George et al., 1992, p. 17)

The traditional relationship in schools involves about 25 students relating to one teacher for most of the day in elementary classrooms and for only one period (45 to 120 minutes) a day in secondary schools. Long-term relationships, more than a year, are rare. One historical example is the now extinct rural one room schoolhouse. More recent research into the small school is concerned with the relationship between teachers and students. North (1987) in his book, Schools of Tomorrow. Education as if people matter, calls for schools on a “human scale” and argues that “…ideally education will not necessarily take place in school at all” (p. 6). He critiques the movement of public schools toward the very large comprehensive schools and suggests that 800 to 1,000 students is a “satisfactory minimum”, although smaller is even better (p. 142). He cites such benefits as“more personal contact with individual children becom[es] unavoidable and good relationships are more easily established.” There are less “rigidities of an elaborate timetable”, more parental involvement, and “a good standard of discipline [become] easier to establish and maintain” (p. 143-144).

In a compendium of research on big schools vs. small schools, Witcher and Kennedy (1996) indicate there has been “…a lack of serious studies on school size” (p. 3). However, from the reports included in their study they suggest that the optimum size for secondary schools is similar to that recommended by North (1987). They conclude;

Although the curricular advantages of large schools are clear, it is feasible for small schools, generally through technology, to enlarge the curricular possibilities for their students. The climatic advantages of small schools are also clear, but there are schools-within-a-school alternatives available to large schools to promote personalization in the learning environment. The achievement issue is not clear. Generally, school size itself does not appear to be a statistically significant factor in academic achievement. (Witcher and Kennedy, 1996, p. 223)

A current example of an organizational structure specifically designed to create this type of a long-term relationship is called looping. Grant and Johnson (1995) describe it as follows; “looping is sometimes called multiyear teaching or multiyear placement. It is usually a two-year placement for the teacher as well as the children. The children have the same teacher for two
successive years. Looping involves a partnership of at least two (and sometimes three) teachers, who teach two different grade levels, but in alternate years” (p. 33). These looping arrangements are usually found in elementary school systems, although they are now being used more frequently in middle level schools. The significance of this arrangement for developing long-term relationships is the use of time. As Grant, Johnson, Richardson, and Fredenbury (1996) state, “...time is a tool, to be used with other child-friendly strategies, to promote what is at the core of looping — relationship” (p. 15). It has also been called “teacher rotation” (p. 17).

Another way to help clarify how this long-term relationship operates is to describe what it is not. It “...is not a multiage configuration” although it does “...open up an appealing window of opportunity for creating a continuous progress program” (Grant and Johnson, 1995, p. 33). It is also not solely a guidance or advisor program, which is considered an essential component of a middle school program. It also is not block timetabling although this does describe an aspect of looping. I will clarify these three concepts — multiage or multiyear teaching, advisor programs, and block timetabling — which are sometimes confused with looping. They are not looping in themselves, but they are interconnected parts of it and are used to improve teacher-student relationships.

The term multiage grouping or multiyear teaching, which is a form of non-gradedness, is defined as, “deliberately assembling together pupils from at least two or three chronological age groups comprising a diversified, heterogeneous ‘mix’. [It avoids] the practice of restricting pupil-pupil interactions to a single age group” (R.H. Anderson, 1992, p.9). In this situation students would enter a multiage group at a particular level, say grade one, and leave once they had achieved a grade three level. In contrast, looping usually involves one or more teachers remaining with a group of students, usually of one grade level, and moving with them year to year, grade by grade (Grant et al., 1996, p.18).

Another program important to middle level schools and sometimes confused with looping, is the student-teacher advisory program. Advisory programs developed out of the guidance programs of the high school and were modified to deal with young adolescents. Guidance programs were once the exclusive domains to the high schools. “However, over time, it has become clear that a separate and specialized guidance and counseling system has brought as many problems as benefits” (Hargreaves et al., 1996, p. 60). The institutionalization and professionalization of the guidance programs has created difficulties, such as the use of clinical
language which misses the more “simpler” problems of students, disempowerment of classroom teachers by taking away responsibility for student problems, and an overloaded casework for counselors (p. 60-61).

As middle schools tried to move away from the programs of the “junior” high school, the educators and staffs of schools saw the need to provide an integrated guidance program. The idea of providing guidance on a more regular basis and as a more preventive measure became the trend. The goal of this initiative was to create a more seamless program with small groups of the same teachers and peers meeting regularly for extended periods of time. Advisory programs have become one of the hallmarks of middle schools in North America. MacIver (1990) outlines the following definition: “group advisory periods assign a small group of students to a teacher, administrator, or other staff member for a regularly scheduled (often daily) meeting to discuss topics important to students” (p. 458). James (1974) states, “the paramount benefit of advisories is that they constitute the student’s first line of belonging – a group one belongs with rather than to – thus meeting the child’s need for a strong affiliation with a group of peers within the school” (cited in George et al., 1992, p. 55). In Australian and English schools, pastoral care is one way schools attempt to deal with student problems:

Embedding pastoral care issues within the curriculum helped to ensure that the intellectual and social needs of young adolescents were addressed simultaneously. Rather than isolating pastoral care matters as ‘welfare’ concerns, teachers aimed to develop a sense of self-worth and self-confidence in all students during the full range of learning activities. (Australian N. A. C., 1996, p. 7)

Bergmann and Baxter (1983) outline the benefits of building a strong advisory program. They list three goals as, “to increase communication among students and between students and adults in the school community; to help students develop ways to make good decisions; to establish a heightened sense of individual and group responsibility” (p. 50-51). O’Neil (1997) sees advisory periods as a time for sharing and caring, a time to open new lines of communication, and an opportunity for teachers to show more humanity, a time of joy and learning (p. 23-26). However the advisory program has some limitations. It is conducted for only a few minutes a day, set aside from the regular classroom routine and sometimes with a teacher the students see for only this time period. It does not always facilitate long-term student-teacher relationships. Other blocks include limited time and developed curriculum that would maximize

13 Pastoral care is a term with similar connotations as student-teacher advisor programs.
teacher/student interactions. In addition, as the Australian example of pastoral care indicated, the care and relationship between student and teacher needs to be integrated into the everyday classroom routine and curriculum.

Block time and block plan, another component of middle school programs\textsuperscript{14}, is sometimes misinterpreted as looping (Cawelti 1988 and Sigurdson, 1982). Combining blocking time with team teaching is sometimes called team-block design. It offers a flexible, varied and integrated program (Clark and Clark, 1987, p. 1 and Jung and Gunn, 1990, p. 73). The idea of using large blocks of time has historical roots in progressive education, continuous progress, and the open school concept (Rothenberg, 1989, p. 73).

Mason (1995) indicates that block-of-time or flexible schedules "provide a transition between the large block of time in the elementary school and the smaller periods at the high school, and they facilitate the basic organizational framework of the 'exemplary' middle school - interdisciplinary team organization" (p. 206). He believes its main advantage lies in the flexibility it provides the teachers, which in turn empowers them to make changes (p. 222). Hackman (1995) outlines the guidelines for implementing block scheduling and lists the advantages as providing: more time for creativity and in-depth learning; a daily block of time for team planning; a more relaxed classroom climate; less homework; and increased instruction time [because of less movement between classes] (p. 31). Queen and Gaskey (1997) see block scheduling as a "less frenzied atmosphere" (p. 160), while Thornton (1998) describes it as "fluid" and suggests "team control over time was essential to allow for students needs and interests to be addressed in the curriculum" (p. 31). Kasak (1998) agrees and states that flexibility and increased contact create a situation where "students are actually held to a higher level of accountability than in more rigid school structures with fixed periods and bells" (p. 59). She also indicates that the flexibility allows teachers to "...group and regroup students across the team according to their learning needs" (p. 59). Delany, Toburen, Hooton, and Dozier (1998) agree and suggest it can allow the opportunity for schools to arrange remedial programs. Beane (1990), however, points out that in many cases these blocks of time have been used to teach distinct subject areas and this separation or lack of subject integration has been a challenge for middle schools.

\textsuperscript{14} In contrast, traditional secondary schools students move from class to class, as many as eight times a day depending on the length of periods, to be instructed by an individual teacher.
He suggests block-time be flexible and the daily schedule be determined by the teachers and students (p. 57).

Block scheduling can certainly be an organizational structure that can provide teachers with the flexibility and opportunity to develop relationships with students. However, as Beane suggests, like other innovations or programs, if the schedule is not really a block of time or if it really is just a subject schedule in disguise, then the desired closer teacher/student relationship may not be the result. Sometimes block-time programs can limit and hinder teamwork, the development of integrated curriculum, and long term relationships. Checkley (1997) observes that the traditional “time box”, especially the separate time for math, time for social and each day box, is difficult to change. If teachers are serious about changing how time is used, “the healthiest thing about block scheduling is that it provides for the collaborative structure we need in schools” (p. 8). Block-time can be beneficial to the development of long term student-teacher relationship.

Before I proceed to a review of research into long-term relationships, I would like to discuss the quality of student-teacher relationships. Although we may wish to develop long-term relationships, we must ensure they are productive, caring relationships.

Caring Relationships

Noddings (1984) presents an alternate way to view the goals of public education and recommends organizing schools around “caring”. She describes current school organization as an “…orientation characterized by hierarchy, specialty, separation, objectification, and loss of relation” (p. 200). Among her many recommendations, she states, “no teacher would be alone with students for extended periods of time, or solely responsible for the welfare and progress of her charges” (p. 198) and “a teacher might see one group of students through three years of their schooling” (p. 199). George et al. (1987) report that in their studies of long-term student-teacher relationships, teachers “came to care more about each individual student as a person, not just in terms of academic achievement” and “more and more students, teachers said, came to know and benefit from a continuing relationship with at least one adult who demonstrated authentic caring for them” (p. 10-11). Lake (1989) suggests the development of an “ethos of caring” (p. 13) as an important element of developing an effective middle level school.
The Turning Point report (1989) also had a focus on caring relationships. “Every student must be able to rely on a small caring group of adults who work closely with each other to provide coordinated, meaningful, and challenging educational experiences” (p. 37). In Ontario, Hargreaves and Earl (1990) in their report list “the right to adult care, community attachment, and a sense of ‘home’ in the early years of secondary school” (p. 204) as a right of passage for young adolescents. Kohn (1991) indicates that we must also educate “caring kids.” He suggests, “children can indeed be raised to work with, care for, and help one another. And schools must begin to play an integral role in that process” (p. 506). Sergiovanni (1992, p. 43), a writer in the field of educational administration, discusses the concept of “true” professionalism. He indicates that as teachers become more professional, or have “professional virtue”, there will be less need for direct leadership of them. One of the dimensions of this new professionalism, a form of stewardship is “a commitment to the ethic of caring”, a term he borrowed from Noddings (1984). Let me conclude this section on the caring relationship with thoughts from Noddings (1995). She states, “a transformation of the sort envisioned here requires organizational and structural changes to support the changes in curriculum and instruction” as “the traditional organization of school is intellectually and morally inadequate for contemporary society” (p. 368). “There is nothing mushy about caring. It is the strong, resilient backbone of human life” (p. 368). I don’t think any teacher or anyone for that matter would disagree with the need for caring student-teacher relationships. However, Hargreaves (1994) cautions educators that if teachers emphasize caring as the interpersonal aspect of teaching and minimize the academic ones, chaos and tension in the classroom may be the result. He concludes “when the purposes of care are balanced with those of group management and instructional effectiveness, and when care is construed in social and moral terms as well as interpersonal ones, its contribution to quality in education can be exceptionally valuable” (p. 147) The following is a review of the benefits of this type of relationship, as outlined in the research.

Research Results

In the traditional junior high school and in many middle schools, students are organized much as they have been for the past century. James Herndon (cited in Oppenheimer, 1990) recalls his language arts teaching experience in junior high school. He questions the organizational routine of the daily school experience.
How in the world did this school ever get like this anyway? How did we ever get to the point where we decided that every single child in the seventh grade needed eight subjects all 45 minute long and they had to occur in that pattern? I researched that problem, I talked to people; I read lots of books; I interviewed everyone in town; and what I found out was that none of the people involved in that decision had been around for the last fifty years. In fact, the last one who participated in the decision died 42 years ago. (p. 56)

What was minimized or taken for granted in the development of the traditional graded school described above was the relationship between the teacher and student. In the rush to make schools exemplify factory-like efficiency, human relations took a back seat. However, this does not mean that educators thought the teachers' relationship with the students in their charge was not important. In the 19th century, a good teacher was believed to be a good person and so researchers in thousands of studies looked for the "...special personality traits or attitudes that predicted teaching effectiveness" (Wubbels, Levy, and Brekelmans, 1997, p. 82). The 1960s and 1970s saw the research move into the process-product model, and try to identify the "teaching strategies that contributed to student achievement" (p. 82). Current research has also focused on teacher-student relationships. In the last half of the 20th century, not only has research on these relationships intensified, it has also been looked at from numerous points of view, including those of organizational theory, the growth and development of children, and cognitive and affective effects on learning.

Organizational studies by George (1983) suggest that if schools do not change from their traditional organizational structures, students will lose out because, "human beings require meaningful group involvement, and corporations and schools that ignore this need will find themselves to be far less productive than they might be" (p. 84). Arhar (1992) indicates social organizations such as teams of students and teachers are key to creating social bonding, minimizing student alienation, and reducing negative student behavior and preventing students from dropping out (p. 139). Goldberg (1991), Kasak (1998), and Upham, Cheney, and Manning (1998), agree and suggest that when flexible organizational structures such as team teaching and flexible grouping are created, students will develop attachment, involvement, and membership in the learning culture. Grant et al. (1996), Wubbels, et al. (1997), and Upham et al. (1998) add that teachers need to use effective communication skills and strategies as part of the building of close relationships with students, parents and other teachers.
Research into child development has provided insights into educational relationships. Researchers such as Arnold Gesell, Jean Piaget and, most recently, Howard Gardner have studied patterns of cognitive development and, in the case of Erik Erikson and Howard Gardner, affective development (Grant and Johnson, 1995, p. 22). Rudolph Steiner, the founder of Waldorf Schools, developed theories of child development based not only on physical and intellectual development but on soul and spiritual development as well (Barnes, 1991 and Reinsmith, 1989). Steiner saw the importance of a long-term teacher-student relationship with the use of a lead teacher following students for eight years (Ogletree, 1974, p. 346). All of the above advocated the need for strong, caring, student-teacher relationships in order to enhance learning.

These academic effects on the learner are also a concern and part of the rationale of the non-graded or multi-age classroom (Cushman 1990, Kommer, 1999, Kentucky Education Association, 1991). Sixty-four studies from 1968 to 1990 compared non-graded classes to traditional classrooms and found higher or equal student achievement and more positive mental health and attitudes (Grant and Johnson, 1995, p. 33). As Milburn (1981) states, “A teacher who works with the same group for two or more years is also in a better position to evaluate each youngster’s cognitive progress and prevent fragmentation or unnecessary repetition of instruction” (p. 513).

The middle school movement added to the research and emphasized the development of positive teacher-student relationship as the basis of its programs. As outlined previously in the history of long-term relationships, major reports such as the Turning Point (1989) and Rights of Passage (Hargreaves and Earl, 1990) stress the importance of the development of a positive student-teacher relationship and an inviting school climate. Numerous publications have followed including Capelluti and Stokes (1991), George and Alexander (1993), George, Stevenson, Thomason, and Beane (1992), and Williams and Murphy (1993). They all provide comprehensive outlines of the importance of developing middle level schools that include strategies like interdisciplinary team teaching, advisor groups and flexible block time-tableing in order to improve the relationships between teachers and students especially as increased societal pressures are negatively effecting adolescent development.

The specific arrangements to increase the development of long-term student-teacher relationships, such as multiyear arrangements or looping, have recently attracted greater interest.
George et al. (1987) published a report for the National Middle School Association that dealt specifically with this issue. It was an extensive case study that showed the positive aspects of long-term relationships, as well as the possible disadvantages. Burke (1996), Grant et al. (1996), R. D. Lincoln (1997), and Rasmussen (1998) all emphasize the benefits of looping, or multi-year teacher-student relationships, and indicate how essential this strategy is to a successful adolescent education. Rasmussen (1998) outlines the benefits as “buying time” for students and teachers in order to develop relationships, richer curriculum, strategies to meet the students’ learning needs, decisions of school placement, programs for at-risk students, parent involvement, and smooth transitions between elementary, middle and high school (p. 1-4). The question that the authors of all of these articles have in common is their bewilderment as to why long-term student-teacher relationships haven’t become more common and why they have taken so long to come to the attention of North American educators.

Waldorf schools that originated in Germany have long seen the importance of long-term teacher-student relationships. Burke (1996) also describes other schools in West Germany that successfully use this arrangement, sometimes for up to six years. In Italy a three year model brings students, teachers and parents closer together (Burke, 1997). For the last 12 years in the People’s Republic of China, secondary schools have utilized multi-year teacher / student relationships. And although caution must be taken when we compare situations that are culturally different the results are nevertheless interesting. Liu (1997) indicates “the close emotional bond between teachers and students led students to recognize the school as a home away from home. The teachers’ dedication to students’ growth helped inspire students to meet the school’s requirements, both academic and behavioral” (p. 157). Burke (1997) encapsulates, “despite enthusiastic practitioners, the experience of European school systems, and favorable research, looping is still uncommon enough in the United States [and Canada] to be considered innovative” (p. 1). Although research into teacher-student long-term relationships is limited, I was able to glean the following advantages and disadvantages.

**Advantages**

The outlining of advantages and disadvantages of long-term student-teacher relationships (LTSTR) is mostly based on a few surveys and individual case studies. The issue is also confused by the fact that each long-term relationship is different. For example, you might have
the two year looping of an elementary teacher as outlined in Barth (1996) or the interdisciplinary teams of the middle level, with a team of teachers remaining with students through two or three grades but usually teaching in separate classrooms. A study carried out by George et al (1987, p. 10 -17) and repeated by George and Shewey (1997, p. 19 -20) found that teachers cited the following advantages:

1. improved classroom management
2. more authentic caring as they become more aware of students’ personal lives and the teachers become role models
3. students identify with the team and a team spirit and pride is developed,
4. intense investment in and increase level of commitment to students
5. view students as individuals with greater respect for low-achievers and a freedom from making snap judgements about students’ progress
6. share common observations and knowledge about each student and are encouraged to contact parents and solicit help for students
7. increased levels of time on task and avoidance of unnecessary and unknowing duplication.
8. a willingness to innovate, experiment and create variety in lessons,
9. increased achievement for less successful students and they create long range goals for student achievement
10. increased trust and mutual respect between teachers and parents resulting in higher level of effective communication and assists parents in understanding their child’s school experience
11. improved inter-teacher relationships, loyalty to team and a higher level of cooperation and tolerance especially of new teachers.

(A more complete list of advantages is laid out in Appendix E.)

Students’ views of the long-term relationship with their teachers were generally positive. Students felt that their teachers believed in them, cared for them, and trusted them. They also felt pride in the team and a sense of belonging which helped them develop self-confidence. They also indicated that as they were together with the teachers for a longer period, more was expected of them and they came to understand what the expectations were, both academically and behaviorally (George et al., 1987, p. 19-23). Students made the following comments, “I would really recommend this! The only bad part about it is going to be leaving them – they’ve become so close to me. I’ll really miss them”, “Having the same teachers for two years in a row really takes the stress out of the beginning of the year because you know if you are getting a good teacher or not”, “I really like staying with my team. It’s my second family”, and “I have also gained self-confidence which will help me make my way through life” (George and Shewey,
George and Alexander (1993), Hanson (1995), and Haslinger et al. (1996) also see the improvement of peer-to-peer relationship and an increase in moral reasoning.

Parents saw the value of the long-term relationships with their children and teachers as predominantly positive. In fact "ninety-nine percent of the parents asked for their children to have the same teachers the next year. It is, it seems, a myth (at least at Lincoln [School]) that parents want a new crop of teachers every year" (George et al, 1987, p. 21). Parents felt that the teachers knew and accepted their children and that the team provided a family atmosphere. They believed that their child did better academically and they were more comfortable coming into the school for a visit (p. 20-21). Hanson (1995) observed that the parents "...appreciate the chance to become familiar with a teacher's instructional style and expectations for class work and homework" (p. 43). George and Shewey (1997) summarize:

The three groups of respondents [teachers, students, and parents] seem to agree on several areas. For example, they agreed that long-term relationships helped teachers, students, and parents experience a greater sense of community. The groups also agreed that relationships among individual teachers and students, parents, and other teachers benefited from continuing those arrangements for more than one year, with increasing interpersonal knowledge, caring, trust, and accurate perceptions as outcomes. The qualities of these relationships, furthermore, contributed to improved educational diagnosis and instructional planning. (p. 58)

George et al. (1987) also indicated some of the advantages of the long-term student teacher relationships observed by administrators. They felt that it developed more creative, flexible and responsive teachers. It helped in making decisions about student placements as the teachers had a more in-depth and holistic view of the student. Teachers tended to develop long-range plans and assumed personal responsibility for their teaching and their students. Administrators found teachers enjoying the new "learnings" that developed out of new situations and new grade levels (p. 21-22).

**Disadvantages**

What are some of the disadvantages to long-term student-teacher relationships? Karen Rasmussen (1998) investigated the concerns of both parents and teachers as she interviewed Jim Grant of the Society of Development Education and the National Alliance of Multiage Educators. The following are her questions about the disadvantages of looping and his response to them.
What if there is a personality conflict between a child and teacher? The answer is to move the child to another class. This is what is done in traditional, non-looping classrooms, too. The goal is always to facilitate student learning.

What if my child has to stay with a bad teacher for two years? It is the school administrator's job to make sure that no inadequate teacher teaches in the school, let alone loops, for more than one year. Besides, it's a lot of work; the best teachers usually end up looping.

What if the class is dysfunctional? Sometimes a class may have too many high-need kids or be top-heavy with kids with summer birthdays. Most schools try to balance each class by gender, abilities, needs, culture, race, and linguistic ability. This should be the same for looping classes. (p. 3)

A complete list of teacher concerns or disadvantages with LTSTR are summarized in Appendix E, page 2. One last concern outlined by Grant et al. (1996), referred to as the "halo effect", is...

...the strong bonding that takes place between teacher and child in a multyear relationship [which] can sometimes create an atmosphere where a teacher is more 'forgiving' of her student's academic shortcomings. This 'halo effect' can get in the way of some teachers seeing potential problems, and can have potentially serious problems for the student if necessary special needs intervention is delayed. (p. 113-114)

Parents' concerns are similar to the three mentioned by Rasmussen (1998). Although most parents responded positively, there was a small group of parents who felt their children were "high ability or high achievers" and would not be adequately challenged or stimulated in a looping classroom. These dissatisfied parents may be a minority, but they have intense feelings and "...if expressed publicity, may carry greater weight" than their numbers would warrant (George and Shewey, 1997, p. 58).

Students are generally positive about long-term relationships and the percentage increases as students move from grade 6 to 9 (George et al., 1987, p. 19). However, students are concerned about the make-up of the class and worry that they will not get along with other students, especially if they enter the class in the middle of the cycle (Grant and Johnson, 1995; Grant et al., 1996; Lincoln, 1997). Some students felt that this long-term relationship was more like elementary school and they wanted a greater variety of teachers, classmates, and instructional strategies. They also worried about adjusting to high school (Lincoln, 1997). A few student responses are cited in George and Shewey (1997): "I hated staying with the same teachers because I would've liked to have had a change and going from the seventh grade to eight grade with the same teachers made me feel like I was in seventh grade again." and "I don't like staying
with the same teachers because you had nothing to look forward to at the beginning of school.” and “They [teachers] act like your parents.” (p. 21).

Generally speaking, the students, teachers, and parents did not consider the difficulties to be severe enough to warrant a return to traditional classrooms (George et al., 1987, p. 27). Although they all were apprehensive about the results of poor human relationships and a poor teacher for more than one year, “...few actually reported that they had experienced such a situation” (George and Shewey, 1997, p. 58). In fact, many of the concerns cited in the literature about the looping strategy were the “what if” kind and typically are the same ones expressed about traditional classrooms.

Administrators also expressed concerns. They all suggested that any negative teacher–teacher or student–teacher relationship needed to be dealt with immediately. However most of the concerns expressed were in the area of the difficulties of implementation. Grant and Johnson (1995) advise that teachers need to be highly motivated, creative, and flexible, to be involved in looping. George et al. (1987) also suggest that the administrator will be under pressure to answer “unending requests to explain and justify” and this is “...a burden with which administrators would have happily dispensed” (p. 23). The above concerns indicate that care and thought must be taken before the implementation of a program that creates long-term teacher-student relationships in classroom.

Conclusion – Looping

As outlined in the review of the historical roots of long-term teacher-student relationships, the idea is not new and any less immediate for those who advocate this educational arrangement. There are currently educators still advocating a move away from the drive for efficiency and towards a commitment to improving and fostering caring relationships in our schools. Noddings (1995) asserts that education needs to be organized “around themes of care.” Hargreaves et al. (1996) agree and outline a “case for care” at all levels from self, intimate others, acquaintances, nature, human-made objects and ideas (p. 58-59). Johnston and Markle (1986) call for schools that are characterized by “pervasive caring” (p. 5). Kohn (1991), like Noddings (1986), calls on us not only to care for students but to demonstrate a commitment to developing “caring kids”. The challenge to establish caring in schools is developing “deep empathic

Hargreaves (1997) observes that “…our change efforts have been so preoccupied with skills and standards that they have not gotten to the heart of what a great deal of teaching is about: establishing bonds and forming relationships with students, making classrooms into places of excitement and wonder, ensuring that all students are included and no one feels an outcast…” (cited in Ireland-Chomyn, 1997, p. 98-99). Arhar (1992) and Australian N.A.C. (1996) advocate the need for strong social bonding, care and commitment by adult caregivers and educators in order to reduce alienation and the feeling of being “outcasts”, as Hargreaves suggests. Miller (1999) and Moffett (1994) call for schools in our education system to concern themselves with the “soul” and “spirit” of our students as well as with their intellectual needs. Curriculum programs need to deal in an integrated manner with “healing” and personal “growth”.

So how can the traditional, departmentalized, segregated, competitive classroom foster this important attribute of caring in our students? As I have outlined in this chapter, team teaching and the development of long-term relationships can certainly provide the opportunity and environment for teachers and students to work on caring for their spirit and their soul. Barth (1996) indicates that the best way to begin and “…the greatest continuity comes from adults related by bonds of respect, interdependence, trust, communication, and caring” (p. 100). Doda, George, and McEwin (1987) suggest that teachers must work “…to weasel their way into the hearts of the young adolescents they teach” (p. 5). Beane (1990) indicates that educators need to “…rethink the role and configuration of teachers in the middle school” and “not be viewed as subject teachers, but as teachers of early adolescents” (p. 55). One way teachers can develop relationships of caring and continuity, “weasel” their way into their students’ hearts, and become teachers of students not subjects, is by using team teaching and looping. Oxley (1994) calls for small inclusive units.

Organizing schools by units encourages a coordinated, cross-disciplinary approach to instruction. Within a unit, teachers share a group of students in common rather than a discipline. They take collective responsibility for their students’ success, and they work together to unify instruction and allow students the opportunity to exercise skills and knowledge across subjects. (p. 522)
The following quote can serve as a final comment on the importance of creating schools that nurture the development of students' intellect, emotions, physical body, spirit, and soul in a caring envelope:

We will all do well to remember that in our relationships with youngsters, as in our relationships with each other, what goes around comes around. If we want a better society for future generations, we have to build it now through the trusting relationships we build with youngsters and the humanity we represent. We must do it now. (George et al., 1992, p. 31)

**Microscopic Lens / Jubilee Project**

**How does this all relate to large group instruction?**

Finding examples of schools or classrooms that matched the outline of the Jubilee School project classroom in Chapter One for this literature review has been difficult. This was to be expected, as no two schools are identical. Notwithstanding the idiosyncratic nature of schools however, there were other difficulties in finding comparable classroom situations. The main difficulty is there are few examples of long-term (three year) teacher student relationships that include total daily curricular responsibility by a team of three teachers. Another problem in comparing the teaming of teachers to such examples as multiage or non-graded situations is that they tend to be found mainly in elementary schools and many of them have utilized individual teachers in their own classrooms. Middle level interdisciplinary teams don’t quite match the Jubilee teams. Though they do plan together and share some students, the teachers generally teach in their own classrooms and / or stay at one grade level and teach a new cohort of students each year. It is even more difficult to find historical examples when one considers the other aspects of the Jubilee project, such as its integrated curriculum, authentic student assessment, community development, and shared leadership.

Another difficulty I encountered in locating similar situations was in the review of the literature on collaboration, which tends to be studied at a school-based level (Donaldson and Sanderson, 1996). To work collaboratively in a school or to work on an interdisciplinary team does not necessarily mean that you actually teach in front of peers. In fact, much of interdisciplinary team teaching and school collaborative projects are used to plan lessons that are taught separately in individual classrooms, and only sometimes with shared students. This situation is still not similar enough to the large group classroom at Jubilee. The following is a
case-by-case comparison of some examples that seem initially similar and were suggested to me by other educators as being important to the review of the literature for the Jubilee project.

To locate my research in the progressive genre I consider the Eight-Year Study, the Hall Dennis Report, Open-Area and Middle School movements, and general changes recommended to the British secondary schools as exemplified in the Leicestershire Plan. I also discuss exemplary school projects in both Canada and the United States and look briefly at the transition years’ initiative in Ontario during the 1990’s.

The Eight Year Study (Aikin, 1942) resembled the Jubilee project in spirit. In reality there were 30 separate projects, in 30 schools, and, generally, the project had some common elements. The innovations were local and teacher-initiated. Curriculum was developed with input from students and parents. Many of the projects in the Eight-Year Study utilized integrated curriculum with forms of team teaching. Some schools moved away from test scores, and instead, emphasized the use of projects to demonstrate students’ abilities. Again, the community was involved in the planning and implementation of the programs including work experience, research material development and mentorship for students. The premise that all thirty schools used to make their transformations was a holistic one, changing well-established structures.

The thirty schools did not “pose as model schools” or “claim to have solved all problems” but through their own collaborative work and consultation with other schools they were able to achieve results they never thought possible (Aikin, 1942, p. 127). They stated that copying what other schools had done was a mistake and “it is only when these paraphernalia [patterns of school buildings, classrooms, classes, textbooks, courses, grades, credits, diploma] of education can be pushed into the background of one’s mind that realistic thinking becomes possible“(p. 130). The major differences that I observe between the Eight Year Study and our project is that we at Jubilee have concentrated more on eliminating the hierarchical organization of leadership and moved to a model of continuous team teaching. In addition, the thirty schools in the eight-year study were high schools, not middle level.

The Hall Dennis Report (1968), Living and Learning, is an example of the resurgence of the progressive ideals in Canada in the early 1960s. This document, developed by a group of prominent Ontarians, promoted many of the progressive ideas of Dewey as well as some holistic ideals. Like the Eight-Year Study, the Hall Dennis Report advocated breaking down the “bureaucratic jungle” and “organizational structures” that inhibit structural educational changes
and reduce flexibility. It also advocated the need for integrated curriculum and the use of team teaching. It identified the need to change student evaluation and move away from the mono-vision of tests and grades. Community and parents were considered key partners in this effort to retool public education.

Although I see many holistic features in this report, I feel that unlike the Eight-Year Project, many of the holistic and progressive recommendations were never implemented. Some of main issues or concerns outlined in the report, such as technology, communication, access to education, economics and research and development have been the focus of educational change in Ontario. Many of the structural aspects such as team teaching have not been addressed. The holistic reforming of schools, which the final exhortation of the report recommends, epitomizes the difficulties of matching recommendation to actual implementation of changes. “We trust that this Report will be studied as a whole, and viewed as such, and not as a collection of unrelated topics” (p.175).

Another innovative program that emerged in the 1970s was the ‘open school’ or ‘open area’ concept. It seems that the greatest similarity between the open schools and the Jubilee School project is the open architecture of the classrooms. At Jubilee, we indeed needed to change the school’s physical structure and create open spaces for our teams of three teachers and seventy students. However, unlike many of the open areas of the 70s, we do not have three individual teachers with three different classes teaching in one large open area (although this was not the original intent of the open area school). At Jubilee, the teachers’ collective responsibility is to collaboratively create learning situations for all. In the conclusions of their study of openness in schools Traub et al. (1976) felt that more research would be needed to “...distinguish clearly between openness of architecture and openness of program”(p.61). I also see that just opening up the space in the classroom does not necessarily open up the attitudes of the teachers and administration. Again, there is not a significant match with the Jubilee project.

I compared the Jubilee project to the “progressive type” reforms advocated in the British educational scene. The historical development of these are outlined and critiqued in Dufour (1990) and Holly (1973). Holly outlines the traditional nature of secondary schools and the attempts to bring about “progressive” changes. He outlines the distinction between reformists and revolutionaries. Among the major revolutionary changes proposed was the dehierarchization of school organizations, a reversing of the top-down programs, and the restructuring of
traditional subject areas into integrated units. Dufour (1990) also outlines the “cross-curricular themes” movement and notes that the advocates felt that curriculum themes should “… impinge on the lives of young people and [be] directly relevant to the world in which they are growing up” (p. 11). Flexible changes to timetables, and team teaching were also seen as essential to bring about the needed changes in secondary schools. Finally, the collaborative efforts of teachers in a “whole school policy” and the cooperation of parents and local education authorities was seen as fundamental. “What is needed is superior organization, a system of teachers and learners working together to ensure free thought and the growth of self-confidence and self-respect” (Holly, 1973, p.180).

The Leicestershire Plan is a specific example of major innovation in all levels of schooling. The innovation in High School (Middle level) occurred in two phases and, at first glance, seems very close to what was implemented at Jubilee School three decades later. The second phase, which began in 1970, saw the movement of the ten plus students (grade six) from the primary school to the high school (middle level). This was certainly an aspect of the open and middle school movement. The impetus to have a specific curriculum for these students caught in the middle of primary and upper (high) school was paramount. The middle level school was meant to be a transition, not a holding tank. There were specific cognitive and affective needs for adolescents that were not being met in the traditional middle level school organization. The addition of the ten plus students allowed more time for the development of skills and attitudes in these students before they entered the upper school system (Illsley, 1980). However when we get to the specific changes at the organizational level there are distinct differences.

Although ten plus students spent their first year with a minimal number of teachers, the next three years (Grade 7 to 9) were spent working with teams of teachers in the areas of design, movement, Humanities, English, Science and Mathematics. These teams attempted to develop integrated curriculum but did not work with the same cohort of students (about 75 at Jubilee) for all three years. In addition, other than the “multi-ability tutor group”, which was the same for those years, students were reorganized with different students and teachers over the last three years in the high school (Stokes, 1980). Thus there was no constant, daily, continuity of the teachers and students in the development of lessons, evaluation, and remediation. As the Leicestershire high schools were influenced by the middle school philosophy, let me discuss that in a little more detail.
The Jubilee School project has many times been identified as a middle school program and it certainly has similarities to other middle school initiatives. The interdisciplinary team teaching, block timetabling and advisory programs match the Jubilee project, on the surface at least. At first glance it would seem that the Jubilee project is, in fact, a middle school program. However, the staff had not studied the middle school philosophy at the time of the implementation, as the middle school movement was just establishing itself in Alberta in the early 1990s. Closer investigation reveals that the majority of interdisciplinary teams in middle schools tend to plan together but teach in their own classroom, whereas at Jubilee where the teachers teach side-by-side. Unlike middle schools in which students move on to a new team of teachers each year, students at Jubilee School stay with the same teachers for three years. In addition, advisory groups tend to meet outside of the daily classroom subject schedule rather than being integrated into the daily classroom life. Finally, blocks of time in most middle schools are scheduled by using a school master schedule while in the Jubilee project teachers had the flexibility to plan the whole day. Most middle school programs don’t utilize the same style of long-term relationships and team teaching as does the Jubilee project. However, if the interdisciplinary teams at middle schools follow their students for more than one year, looping as described by Grant et al. (1996) earlier in the chapter, then there are greater similarities.

In Ontario, in the early 1990s a movement to change the schooling for middle level students was initiated. The Transition Years Project was especially interested in grade nine students and the transition to high school. In two reports, Earl (1992) and Hargreaves et al (1993) the schools studied presented a middle school philosophy and a concern for the development of transescent students’ skills and attitudes. They did not believe middle level was just a place to prepare for high school. These reports evaluated several pilot projects, and again, some similarities to the Jubilee project emerged in the use of interdisciplinary team teaching and block timetabling. But as grade nine students in Ontario are in high school and teachers taught in their individual classrooms, the organization of the students and teachers did not resemble the three years, all day experience of the Jubilee group project.

I also did a review of Exemplary School projects. Arnold (1990), Gaskell (1995), Horenstein (1993), and Williams (1993) compiled descriptions of exemplary school projects from across Canada and the United States. These examples range from all levels of schooling, both public and private. All are excellent programs but few utilized team teaching and none
utilized the model of the three-year long-term relationship. Arnold's examples (1990) outlined eighty exemplary middle level projects and, as in my review of middle schools, no examples were uncovered similar to the Jubilee Project.

The two examples that came closest to the Jubilee project included a Waldorf classroom and some classrooms in Iceland. The organization of teacher/student in a Waldorf classroom resembles the attempt by the Jubilee teams to establish long-term student-teacher relationships. In fact, "the 'class' teacher", who moves up the school - ideally from Grade 1 to Grade 9 - with her class", typically teaching the same group of students every morning (Hughes, 1992, p.31) is similar to the Jubilee team teaching. However, the team teaching at Jubilee seems different as all three teachers take responsibility for the planning and delivery of all the lessons and, among them, develop an integrated program. No one teacher on the team is the "class" teacher, at least not in respect to the students and lesson planning. Thus, the Waldorf "class" teacher is not quite the same as teachers in the Jubilee project. And certainly the spiritual underpinnings of the Waldorf school are unique in relation to public schools.

The other specific example I came across was team teaching in Iceland. I take this description from an academic paper written by Lilya Jonsdottir, an OISE colleague. Jonsdottir (1995) states "it is customary in Iceland for teachers who are class-teachers for grades one through seven to specialize in a particular age group and to follow the same class for a number of years, teaching most of the academic subjects" (p. 2). As well, "it is quite common in my school that two teachers 'take on' two classes and team-teach them for three or more years" (p. 3). The goal of this arrangement is to provide a "caring" community for the teachers and students. The teachers in the team of two enjoy the collaborative support of each other. The Jubilee project and the situation described by Jonsdottir are virtual identical, except that the two teachers in the Icelandic situation do spend time alone in their own classroom. They do divide up and plan part of the day on their own. They join together when they feel it fits their curricular needs. At Jubilee the three teachers plan together all the time and are in the same room and are responsible for all the students in the class.

Overall the fact that the changes at Jubilee were interconnected and unique, in both their combinations of curriculum components and location, defies extensive comparison to other schools. I do see that our attempt was to change the underlying structure of a school, so that a caring, collaborative, learning culture could develop. The staff and I saw the interconnected
nature of the components of the change; each was dependent on and affected by the others. The whole became greater then the sum of its parts. I believe these changes were holistic in nature and I use the holistic education philosophy as a frame to secure the weaving of all the strands of the Jubilee project together.

**Holistic / Global / Transformative Connections**

Before I outline the holistic nature of the structural and organizational changes made at Jubilee School I will briefly describe holistic and global education and transformative learning.

**Holistic education.** Holistic educational thought has emerged from a long history of education and non-education philosophers alike. They have used labels such as "liberal", "humanistic", and "romantic". Both J. P. Miller (1993a) and R. Miller (1990) outline the development of the "holistic" movement and indicate it as a "radical" split from traditional educational theorizing, including the progressive movement, that has developed in the western, industrial, technological culture. In fact, both authors speak of fundamental changes that must occur in our current thinking and worldviews. "Holistic education is not just a different way of teaching children, it is implicitly a statement that the values and beliefs of our culture are fundamentally impoverished and unsatisfactory" (R. Miller, 1990, p. 158).

Holistic education has a number of characteristics that set it apart from traditional views of curriculum and education. R. Miller states that holistic education cannot be defined, as "...a particular method or technique; it must be seen as a paradigm, a set of basic assumptions and principles that can be applied in diverse ways..." (1992, p. 21). J.P. Miller (1993b) states that the "central principle" of holistic education is an "interconnectedness" which results from our "...awakening to the interconnectedness of all life" (p. 4). Holism can be contextualized philosophically in the "perennial philosophy" (1993a, p. 10-28), psychologically in the "transpersonal self" (1993a, p. 29-45), and in the social context of the "ecological/interdependent" perspective (1993a, p. 46-60).

The metaphors of balance, inclusion, and connections are used by J.P. Miller (1993b, p. 6-16) to describe the holistic perspective. Holistic curriculum knits together the "fragmentation of life" (J.P. Miller, 1993a, p. 1) created by the scientific, egocentric, patriarchal, capitalistic, industrial, consumer based economic system of the overdeveloped northern nations. Holism is an
"...attempt to facilitate a broadening of vision and perspective" (1993a, p. 7) that seeks to reduce the alienation and isolation of individuals in society.

The metaphor of balance portrays the world from the standpoint of perceived dichotomies. The effect of this kind of thinking results in disequilibrium in society. Some of the dichotomies in need of balance include: male/female, independent/interdependent, quantity/quality, outer/inner, rational/intuitive, economy/environment, hierarchy/network, technology/consciousness, material/sacred, and global/regional. The goal of holistic education is to help students understand these and develop means by which students can bring them into balance in their own lives (J. P. Miller, 1993b, p. 11).

J. P. Miller (1993a, p. 4-7) uses the concepts of transmission, transaction and transformation as "advanced organizers" to situate inclusion within holism, the second metaphor. Transmission, the "atomistic" or "logical positivistic" position, views teaching and the gaining of knowledge as the imitation and repetition of traditional ways of knowing and behaviors through the telling of stories and the singing of songs. It is the teacher telling or passing on the important cultural wisdom to the student. Taken alone, this is problematic, but it can be an important element of learning. Teaching and learning in the transaction position is of the sciences and the academic disciplines that have been based on experimentation and problem solving. This position sees knowledge as changeable and manipulative. It manifests itself in dialogue between the teacher and the student using thinking skills to solve problems. The transformative position represents the belief in the integration of all ways of knowing. It sees knowledge as a collaboration of the teacher and the learner. The teacher integrates subject matter and learning activities, involving all aspects of the child. It is inclusive of the other two positions. "As long as the form of learning does not discriminate or diminish the individual in any way, then it should be included" (J.P. Miller, 1993b, p. 14). All three types of instruction have their place in a holistic classroom.

The third metaphor of the holistic perspective is interconnectedness. Discovering the relationships between things is crucial to the integration of the personal and the social, which have been fragmented by our modern society. Areas in need of establishing connections include linear thinking and intuition through the use of creative writing; developing relationships between mind and body through movement and dance; revealing the connections between the academic disciplines through the use of creative problem solving and integrated curriculum;
creating and demonstrating the connection between self (student), classroom, and community through service. The final connection is to the spiritual or the sacred in nature, the need to connect our conscious or “ego self” with the deeper or “cosmic SELF”. All of these connections must be addressed and become an integral component of the curriculum and mission of schools (J.P. Miller, 1993b, p. 14-16).

The holistic curriculum perspective is not only a way to bridge the gap between the apparent opposing positions in education, but it also functions as an integrating web that allows the current debate to move from a battle over “isms” to a common effort by all. This is not to implore another perspective or suggest a choice, but to provide a unifying, holistic weaving mechanism. To continue developing curriculum from a single or even a “composite” perspective will not lead to any viable solution.

Over several years a debate within the field of holistic educational thought was carried out in the *Holistic Education Review*. The main criticisms seem to center on the non-critical nature of holistic education (Gelb, 1991 and Heshusius, 1991), the perceived dichotomy between holistic educators and the “others” (Gelb, 1991) and (Kesson, 1991), and the lack of concrete action (Lehman, 1990). Gelb (1991) states “...I do not believe we are thinking critically when we claim that we are on the edge of an age of harmony” (p.39). Purpel and R. Miller (1991) reply to this concern by conceding that holistic educators may have dwelt on this positive vision of a changing paradigm or worldview without facing the social and cultural realities of violence, poverty and environmental destruction. They state, “by avoiding critical analysis and, in particular, social and moral criticism the overemphasis on spirituality and intuition becomes naively optimistic about the prospects for cultural transformation” (p. 35). They suggest that holistic educators must deal in a very concrete and personal way with the cultural and social context in which they find themselves. “An education that is truly holistic engages us with the world and calls upon us to respond to it, in all of its complexity” (p. 36).

The dualism or paradigmism as Gelb (1991) calls it is another pitfall of the ‘them’ and ‘us’ mentality. He suggests that some of the so-called holistic educators have jumped the “new paradigm bandwagon”. Heshusius (1991) states “education could only benefit from a merging of spiritual and scientific approaches” (p. 60). Kesson (1991) also encourages holistic educators to

15 The title of this periodical has changed to *Encounter: Education for Meaning and Social Justice*. 
move beyond the dualism of the past / future and states “I believe that where we are, is more relevant than either…” (p. 47). Clark (1991) summarizes:

...Each group needs to be listened to rather than merely tolerated; to be appreciated rather than argued with; to be accepted as filling a legitimate “niche” in the holistic community rather than “corrected” to make it something other than what it is; to cooperate rather than compete; to be honored rather than dismissed. (p. 45)

R. Miller (1991a) states “a holistic paradigm must point beyond itself; it must be seen as only a step toward an even deeper understanding that transcends all paradigms” (p. 50).

This final critique about the need for action has a direct connection to the Jubilee School project. As Lehman (1990) states “I think we have the theory down well now! It’s time to get on with the practice” (p. 13). We at Jubilee have acted on our beliefs and changed our practice. Although we do not exemplify all of the holistic characteristics described above, we have taken a whole school perspective toward change and localized it. We have approached our changes with what Brown (1991) calls a “beginner’s mind”, with “a mind open to all new ways of viewing education and schooling; a mind that is free of all past reform attempts, rationales, and visions” (p. 24). Stoddard (1992) talks about the need to have “a new vision, or mental image that allowed people to think differently and overcome a crippling mindset” (p. 51). As Sizer (1992) states, “there is no one best model ... each school must be shaped by its own people and respect the community it services” (cited in Eklind, 1994, p.11). Our project is local, begun and developed with school and community input. It is holistic in nature because it has taken action to bring about changes to the structural and organizational nature of a traditional secondary school. The changes include: dismantling the hierarchy of administrative and teaching organization; establishing integrated curriculum; reorganizing classroom and curriculum; changing the student evaluation process; and establishing community connections. It is holistic because the changes are interconnected and occur simultaneously. I will have more to say on the holistic structure after a description of global education and transformative learning.

Global education. Global education has many definitions and interpretations and is a relatively recent educational movement. The form that I describe integrates two strands of educational thinking and practice, “worldmindedness” and “child-centeredness”, that have had a marginal influence on schooling during the past century (Pike and Selby, 1999, p. 11). In In the Global Classroom (1999), Pike and Selby outline global education within the framework of
systems theory in which “the relationship is everything”. Their model of global educational theory and practice includes the four dimensions: “spatial”, “temporal”, issues, and “inner”. The spatial dimension is central to the concept of interdependence and systems thinking that students need to develop. The issues dimension outlines that there are many interconnected issues in our current global situation, each of which has several perspectives. The temporal dimension speaks to the notion that phases of time (past, present and future) are interactive and we should develop in our students an alternate future orientation. Finally, the inner dimension is expressed in the process of an inward and outward journey that students need to take to understand their world (p. 12-14).

Pike (1990) states that global education “...is a contemporary response to the urgent need to educate young people for a world of increasing interdependence and rapid change” (p. 133). Ferguson (1987) articulates it in a more graphic manner,

whereas the young need some sort of initiation into an uncertain world, we give them the bones from culture's graveyards. Where they want to do real things, we give them abstract busywork, blank spaces to fill in with the “right” answers, multiple choices to see if they can choose the “right” answers. Where they need to find meaning, the schools ask memorization; discipline is divorced from intuition, pattern from parts (p. 284).

There is a need to change the way we look at the world. We need to move from a “...linear, compartmentalized, polarized way of seeing things that has infused Western thinking for some time...”(Pike and Selby, 1992, p. 10). This “fragmentationalist worldview” outlined in Greig, Pike, and Selby (1989, p. 16-17), and the mechanistic paradigm described in Pike and Selby (1988, p. 29) need to be replaced with one that is systemic and holistic. Global education provides the “missing link” (Dufour, 1990, p. 207). It is “…a new context for education, one that focuses on the needs of the natural system that sustains us, as well as the needs of families and communities and our personal hopes and desires. An educational system that is rooted in a planetary value system” (Kiil, 1994, p. 1).

In more recent articles, Selby (1999) suggests that global education is the educational expression of a “biocentric, holistic, transformative genre” and “has implications for the nature, purposes and processes of learning and for every aspect of the functioning of a school or other learning community” (p. 126-128). He also suggests that the “green” school movement, although a step in the right direction, has missed out on a deeper understanding of the interconnected nature of the issues and the ongoing process of finding solutions. Selby (1996) suggests that
schools need to adopt a "darker shade of green". These schools need to "seek to inform their
organizations, relationships, and processes of change with ecological principles" and "insights
into holistic change drawn from the nature of ecological systems" (p. 42). Selby states "those
embracing a dark green philosophy also recognize 'green' to be more than a synonym for
'environmental'. They view issues of culture, development, environmental and social justice,
equity, health, and peace to be seamless and inseparable" (2000, p. 89). He calls for ecological
school reform that is "broad-based" and "whole" school.

If schools overlook the holistic, broad-based nature of their projects, they become
"fragmented in conception and implementation, their initiatives prove unsustainable" (Selby,
1997, p. 2). Using the critical mass theories as principles for school change, Selby outlines the
characteristics of a sustainable school change process as: 1) coherence and shared goals, 2)
diversity, 3) multiple fora and foci of change with multi-directional and multi-medium
communication flows across the school and community, 4) ongoing, systematic, multi-level
personnel development, 5) creation of collaborative work cultures, and 6) a broadening of the
leadership net (p. 9-10).

Certainly the basis of the Jubilee project was to prepare students to be socially
responsible citizens, but the four dimensions of global education described above were not
directly articulated in the goals of the project. However, I do see connections to the sustainable
school change process described above. The Jubilee School project developed a flexible
organizational structure that provided the opportunity for the development of shared goals
amongst the teams and allowed for diversity in each to be multi-directional, ongoing, and
systemic. The large group instruction was most successful in the creation of collaborative work
cultures in the three years together and broadening leadership as each team chose its own leader.

**Transformative learning.** Transformational learning is grounded in the assumption that
the pressing global concerns of today cannot be understood through the current conventional
paradigm or through a single approach. This perspective is based on the need, as outlined by
O'Sullivan (1999), for humans to adopt a "functional cosmology" (p. 2). This cosmology can be
"effective in providing a basis for an educational programme that would engender an ecological
sustainable vision of society in the broadest terms; what can be called a planetary vision" (p. 4).
"The fundamental educational task of our times is to make the choice for a sustainable planetary
habitat of interdependent life forms over and against the dysfunctional calling of the global competitive marketplace” (p. 2).

The reasons for this “transformational criticism” is the dominance of the industrial, market forces of current transnational economic globalization and the loss of awareness of the citizenry to its earthly connections. The problems created by these forces are manifested in pollution, resource depletion, alienation, and other social problems as described in Chapter One. It is in this transitional or “watershed period” between a society dominated by a modernist worldview and the emerging ecozoic period that education needs to transform. It is “an evolutionary transformation that transcends the forces of modernism and includes them at the same time” (p. 1). It is an ecozoic vision with a functional cosmology that “posits a radical restructuring of all current directions” (p. 2).

Transformative thinkers challenge education to consider the “magnitude of our present moment” in the unfolding of the universe, but they do not let it paralyze us from action. O’Sullivan (1999) suggests we educate ourselves to “survive, critique, and create” (p. 8). I believe he is suggesting that we need to take stock of the positive aspects of our existence such as the rise of democracy, banishment of slavery, and the emergence of liberal feminism, and to have a hopeful outlook for the future. Then we need to critique the “entrancement with industrial civilization” and the resulting “cultural pathology” (p. 3). We need to begin to develop and connect to a cosmology based on a reconnection to the earth, peace, social justice, and the acceptance and cultivation of diversity. Finally we must be creative in our educational vision, allowing it to resonate with a planetary context. Specifically we need to develop education that is human in its scale. Educational systems need to create “cultures of permanence with a sense of community and place” (p. 252) and “a sense of continuity in one’s environment” (p. 244). Our curriculum should be based on “…a planetary consciousness that also calls for both human social justice and a sense of justice connected to the wider natural world” (p. 256). At Jubilee School we were intent on building a community of learners and on providing this community with a sense of place. However, our vision was not connected to the cosmology that O’Sullivan has described.

In closing, I want it to be clear that I am not suggesting that the curriculum and underlying philosophies that directed the Jubilee project were embodiments of the holistic,
global, and transformative ideas described above. In fact, these concepts were only brought to the author's consciousness during course work at OISE in the 1994 / 1995 school year. These ideas were transmitted to the Jubilee staff by subsequent discussions with me. Our large group project had started two years earlier and, in the beginning, was not directly informed by these philosophies. This is not to say that elements of them cannot be found in the activities and beliefs of the teachers. What I do propose is that our feelings of dissatisfaction with the education system in which we were working did influence us to see the need for change. The result was that we made fundamental changes to the structure and organization of the school. The following is how I place the Jubilee project in relation to holistic, global, and transformative education.

The concepts of holistic, global, and transformative education have been around for at least 20 years. The actual number of classrooms, let alone schools, that have adopted these education perspectives is in the very small minority. Programs implemented in these areas, in relation to individual students, have made some difference but, again, on a small scale. I surmise this is the case not because many excellent teachers have not tried and are not continuing to implement excellent activities with their students, but because of the underlying bureaucratic structure and organization of our schools. We have yet to make the full scale shift to a more holistic, global, and transformative approach (message) partially because education system has not moved substantially from its traditional stance (medium). As stated by Greig et al. (1989) “schools do not, in their overall working and organization, reflect a holistic worldview; they are still, by and large, engine houses of fragmentationalism” (p. 29).

**Holistic Structure**

If education cannot be mended, perhaps it can metamorphose. As someone pointed out, trying to explain the difference between reform and transformation, we have been trying to attach wings to a caterpillar. Our interventions in the learning process to date have been almost that crude. It is high time we freed ourselves of attachment to old forms and eased the flight of the unfettered human mind. (Ferguson, 1987, p. 321)

Ferguson made this observation in 1980, and ever since it has remained a valid challenge for public education. My teaching and administrative career in Alberta’s school system has spanned a slightly longer period and, based on my own personal experience and observations, I would have to concur with the above statement. Our attempts at school change have been crude and ineffective. For most of my career in education I believed that if we could only work a little
harder (evenings, weekends, and holidays) at what we did as teachers or administrators or if we could somehow work more collaboratively or if a brilliant and charismatic leader could come along, we could make public schools better and help solve the very complex problems\textsuperscript{16} manifested in our current society. In fact, creative and enthusiastic teachers have come along and magical things have happened for students in their classes. Collaborative and dedicated groups of teachers along with an enabling leader have completed educational feats of heroic proportions. However, in all instances it took extreme dedication and almost superhuman effort to maintain the innovative program, not to mention the fact that if a key person or persons left the situation, there was a movement back to the status quo.

Thus after twenty-two years in a classroom, eleven years as an administrator and six years of graduate work, I have come to view the inability of public education to transform\textsuperscript{17}, to be in part the result of the underlying structure and organization of education. These structures and organizations are linked to the mechanical worldview that maintains problems can be fixed by simple linear problem solving techniques. The world is viewed as per the mechanistic Newtonian Universe Model. “The philosophical-scientific paradigm for this position is an atomistic view of the universe in which reality is seen to consist of separate, isolated building blocks” (Miller, Cassie and Drake, 1990, p. 3). Pike and Selby (1988) state, “the fragmented nature of the school experience is but one clear manifestation of the ascendancy of the mechanistic paradigm in education” (p. 30). Cardellichio (1995) elaborates on this point:

The structure of school inhibits our attempts to create opportunities to pursue procedural knowledge. Because we have relatively short time periods with students each day, and because those time periods are divided into chunks labeled with subject-matter names, and because those chunks are controlled by syllabi listing topics to be “covered,” it is apparent that the structure of secondary schools reinforce an emphasis on factual knowledge. (p. 631)

This structure I refer to is not just a group of individual or distinct problems, but an interconnected or systemic group of features that result in problems\textsuperscript{18}. Eisner (1988) views the

\textsuperscript{16} I include such problems as environmental pollution, depletion of natural resources, inequitable distribution of the world’s resources, stresses created by seemingly uncontrollable technology, inequity issues due to gender, race, and class as examples.

\textsuperscript{17} A more popular term in recent years has been restructuring. However I believe this term lends itself to the “gluing wings on caterpillars” metaphor quoted previously.

\textsuperscript{18} In schools these structural constructs include such things as bureaucratic hierarchy, grade levels, numeric student evaluation marks, discipline based curriculum, daily timetables and schedules, teacher evaluation policies, etc.
problematic features of today’s schools as “...ecological in character”. He cites the five problematic features as “structurally fragmented character”, “isolation of teachers”, “incentives we employ to motivate students”, “the distinction students make between life-relevant and school-relevant learning”, and “teachers’ perception of personal efficacy”. He outlines the five dimensions that need to be considered to improve schools. “These five major dimensions are (1) the intentional, (2) the structural, (3) the curricular, (4) the pedagogical, and (5) the evaluative” (p. 24-25).

Pike and Selby (1988) also see structure as impeding transformation in our educational system. “Learning for the twenty-first century must recognize and reflect the systemic and holistic qualities of the world which this century will witness, rather than upholding the mechanistic traditions of nineteenth-century schooling” (p. 57). J. P. Miller (1993b) states that it is my belief that holistic education must begin with the effort of the teacher. However, I also recognize the need to work with schools to help create more humane educational environments. Ideally, the individual work and institutional change should go together to bring about that which is genuinely holistic. (p. 17)

This holistic change to the institutional environment needs to occur along with individual teacher transformation. This is the area that I believe we at Jubilee Junior High School attempted to manifest as a result of the initiatives we began over eight years ago. In order for global education to be established and to flourish, more than just structural changes need to be made. It is at this point in my educational journey that I feel we must not just reform or restructure schools. Rather, we must transform them into holistic, organic structures that will permit the paradigm shift necessary to survive in the next millennium.

In this thesis I tell the story of the journey that the staff at Jubilee School and I began into the transformational and holistic paradigm, a journey begun by making changes to the basic structure and organization of our school. Specifically, the four holistic characteristics of these changes to the structure of Jubilee School are as follows:

1. “Hierarchy / Network” (J. P. Miller, 1993b, p. 9), or “Human-Scale Organizations” (J.P. Miller, 1993a, p. 51),
2. “Integrated Curriculum” (Miller et al., 1990) or “Subject Connections” (J.P. Miller, 1993a, p. 10),
3. “Evaluative Strategies” (Miller et al., 1990), and
The first characteristic, changing the hierarchical nature of traditional schools and systems is necessary, as "...we are searching for the right relationship between vertical and horizontal in systems and organizations" (J.P. Miller, 1993b, p. 9). As outlined by Sale (cited in Miller, 1993a), "the central values of human scale include individual fulfillment, 'community cooperation, harmony with nature, decentralization of power and self-sufficiency'" (p. 51). There needs to be an atmosphere as stated by Greig et al. (1989) that promotes an organic system where "...any individual member or situs in an organic organization is considered free to initiate acts of leadership which are followed by fellow-members if deemed by them to be appropriate" (p. 30).

Ann Lieberman (1988) advocates the reshaping of the teaching profession, including "...building a school structure that permits autonomy, flexibility, and responsibility, and provides resources for teaching and learning..." (p. 8). At Jubilee School we made major changes in hierarchical structure, decentralization of power and self-sufficiency. We created teams of three teachers and 60-75 students who were free to create their own daily schedule. Each team chose an assistant principal who was a member of a school administration team consisting of principal and six assistants.

Second, the integration of curriculum, breaking down the walls between the subjects and disciplines, is key to structural change. "In the classroom we can approach the whole through making connections among subject areas" (Miller et al., 1990, p. 40). J.P. Miller also sees the need for the connection of subject to self, other subjects, and community in order for the student to make their school learning "less abstract and irrelevant" (1993a, p.100). Beane (1995) summarizes the importance of integrated curriculum in changing the structure of schools and making them holistic,

Curriculum integration centers the curriculum on life itself rather than on the mastery of fragmented knowledge within the boundaries of subject areas. It is rooted in a view of learning as the continuous integration of new knowledge and experience so as to deepen and broaden our understanding of ourselves and our world. Its focus is on life as it is lived now rather than on preparation for some later life or later level of schooling. It serves the young people for whom the curriculum is intended rather than the specialized interests of adults. It concerns the active construction of meaning rather than the passive assimilation of others' meaning. (p. 622)
By block time tabling all core subjects (Language Arts, Mathematics, Social Studies, Science, Health, and Physical Education) and providing a three-year experience for the students and the team of teachers, we removed another structural block that seemed to hinder the implementation of integrated curriculum.

The third characteristic that must match the holistic structure and integrated curriculum is "evaluative strategies". Miller et al. (1990, p. 108-113) suggest that the evaluative methods must correspond to the teaching strategies and learning experiences in the holistic classroom. The movement away from marks or grades began with the school division's adoption of an outcome- or results-based philosophy. The Jubilee teams' attempt to match our changing teaching strategies with compatible student assessment procedures was accomplished by using portfolios and student-led parent teacher conferences to replace mark based report cards.

The fourth characteristic is community building. "Community is central to holism because community implies connections among beings" (J.P. Miller 1993b, p. 119). Peck (1988) also sees the importance of "community making", and in his book Different Drum he outlines the process of becoming a "true" community. He believes that communities are more than just the sum of their parts. Rather, it is the relationships that are interwoven with the participants that represent true community and they are "mystical" in nature. Thus, as teachers work in collaboration with each other and with the community, they model this behaviour to their students. "Co-operative working relationships between adults model in a non-verbal way the type of behaviour that is being encouraged in the children" (Fountain, 1990, p. 88). At Jubilee School we attempted to develop this community relationship by establishing links with the surrounding community through student volunteers and work experience participants. Parents and members of the community entered the classroom and participated in school activities.

Conclusion

In general, the Jubilee project seems to be significantly different from other innovations described in the historical review of the literature yet coloured by all. The staff implemented a unique combination of changes that were developed, not from a packaged, external program, but out of the collaborative efforts of local educators and community to meet the specific needs of

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19 Students and teachers are together in one large classroom for 86% of the school day, with only 14% of their time spent in optional course.
the students in Edson. As well, the teachers at Jubilee put their convictions into action. The changes to the organizational structure were holistic in nature and necessary to allow for a continuous implementation of changes and personal action. It is viewed as holistic in structure as it simultaneously combined all aspects of the school’s organization into the process of change. “Of course, many individual public school teachers are sincerely devoted to their work; the point is that the structure of the system tends to frustrate rather than encourage such devotion” (R. Miller, 1990, p.138). At Jubilee, we wished to encourage devotion.

I believe this thesis will add an in-depth perspective to the long-term relationships of teachers, students, and parents found in a school that has made holistic changes to its structure. Arhar (1992) challenges researchers and practitioners to get into teams and study the bonding that is developed in these long-term relationships,

Many factors that affect students and their membership in schools are outside of the influence of the school. Poverty, family background, language, and personal problems are among the factors that impact the success of young adolescents in school. But the concern here is with the things that schools can do to increase student sense of social bonding. Interdisciplinary teaming offers schools the opportunity to positively influence student bonding to school, to teachers, and to peers. (p. 158)

This is what a school staff did in 1992. This thesis narrates that story of a staff of teachers getting together into teams, planning, teaching, and building caring relationships with each other and their students and parents. The next chapter is their story.
Chapter 3 - Methodology

Introduction

The description of the process of my research, the methodology, seemed quite straightforward to me, although the component parts of the process were much more intricate. As part of my doctoral program, I needed to complete a research project and write it up. My inclination and preference is qualitative research so I chose a topic that is of interest to me: a classroom project carried out in a school where, at the time of the study, I was principal. My primary goal in this chapter is to describe what occurred during this action research project. Although this is a teacher story and their voices will be prominent, I also want to include the voices of students and parents. In order to accomplish the telling of the story with multiple voices I needed to interview and tape-record my discussions to create a permanent record. I also collected documents along the way and made “official” classroom observations to accompany my ongoing observations as participant and principal of the school. As I was telling a story, I used narrative analysis to craft the data and report what was “uncovered”.

As I attempted to explain my research process within the terminology of the research literature I found it does not simply fall into one category of research. There are questions as to whether or not my research is ethnographic or a participant observation? Is it action research? And if so, what type? The following is an attempt to unravel a very interconnected description of my research methodology, and to locate myself in the curriculum inquiry field. In the following discussion I interrogate my chosen method of inquiry, data collection process, reporting and analytical framework, and the ethical aspects of my work.

Why this Research Methodology?

Qualitative Research

Qualitative research, an “umbrella” term for many methodological approaches, has been described by many authors. While they do not necessarily agree with each other on the exact features of qualitative research, they do identify some common features. Bogdan and Biklen (1998, pp. 4-7) and Cohen and Manion (1995 p. 39) suggest the following: qualitative research is naturalistic, uses descriptive data, is process oriented, uses inductive reasoning, and its goal is
meaning making. In the following discussion I deploy these categories in order to offer an overview of qualitative research.

Qualitative research is naturalistic. This means that data is collected in a field setting, the researcher is the key instrument of data collection, and extensive time is spent in the setting with the participants. For my study, this certainly held true. I gathered my data over a period of six years as a member of the school that I was studying. I was the reporter (the researcher), describing a school in which I was the principal and a member of the team making or promoting social change (a participant). Descriptive data, the second feature, means using words instead of numbers, to provide an anecdotal account of the research. This is the way the data is reported in a narrative story about a process of change. Third, this research is concerned with process. Again the Jubilee Story describes a process, an action research initiative, that occurred over eight years and continues. Fourth, the analysis is inductive as the objective of the research is not to prove or disprove something, but to describe an educational event that I believe is significant. In this case, the analysis permits the knowledge to emerge from the bottom up, and to create a kind of tapestry of ideas and reflections. Finally, the meaning-making aspect of the change process that unfolded over the years is developed from the perspective of the participants. I represent only one participant in this narrative. The meaning is developed out of a series of observations and interviews and the result is a narrative analysis: the “Jubilee Story”. My perspective as participant, observer, and researcher is interwoven throughout the story. Thus my research is directly under the qualitative umbrella. I believe the view stated by Marshall and Rossman (1995) captures my outlook toward the use of a qualitative methodology. As they state, it is a process that:

entails immersion in the everyday life of the setting chosen for study, values and seeks to discover participants’ perspectives on their worlds, views inquiry as an interactive process between the researcher and the participants, is both descriptive and analytic, and relies on people’s words and observable behavior as the primary data. (p. 4)

Ethnography

Like qualitative research, the term ethnography does not have one definition. Many authors see that there is no clear dividing line or “...no simple one-to-one relationship between ethnography and any given theoretical perspective” (Atkinson and Hammersley, 1994, p. 258). Bogdan and Biklen (1998) indicate that ethnography is sometimes used synonymously with
qualitative research and fieldwork (p. 29). In fact, L.M. Smith states that “ethnography as social science is fractured” along national, discipline, substantive interests, and paradigmatic lines (1990, p. 1-2) and Pinar et al. appear to agree (1996, p. 58). As well, some researchers use participant observation as another “tag” for the ethnographic approach (J. Van Maanen, 1990, p. 38). I will attempt to clarify this seeming uncertainty with a definition of both ethnography and participant observation in order to show how it relates to this research.

Janesick (1991) states “ethnography is the work of describing and explaining a given culture at a particular point in time” (p. 101), while Conklin (1968) adds that it is a “long study”, “employing a wide range of observational techniques”, and is “face to face” and in “direct participation” with the group being studied (quoted in J. Van Maanen, 1990 p. 38). The origin of the word is from the Greek “to write about people” or “graphy” and “ethnos” a noun for nation, tribes, or people. Janesick also outlines some distinguishing characteristics of ethnographic inquiry. They include being “wholistic”, dealing with relationships, and being personal. Bogdan and Biklen (1998) simplify the definition to a term used by Geertz, who describes the writing of ethnography as “thick description” (p. 29).

It would seem that this research fits into the ethnographic genre because of its potential to capture the complex and dynamic nature of action research in a school setting. The holistic nature of the Jubilee project lends itself to an ethnographic study (Short, 1991, p. 14). Hammersley and Atkinson (1995) see that the political and action orientation of the change process in action research fits the ethnographic paradigm, again another characteristic of the Jubilee project (p. 15). Bogdan and Biklen (1998) cite phrases such as “common sense understanding”, “everyday life”, and “practical accomplishments” all of which are, in reality, indicative of the research site and the people involved (p. 30). There seems to be a natural fit to the “...kind of concentrated action found in classrooms and schools, an action characterized by ‘pupils and teachers [parents]... continually adjusting, reckoning, evaluating, bargaining, acting and changing’” (Woods, 1979 cited in Cohen and Manion, 1995, p. 34). In addition, ethnographic research is “... able to preserve the ‘integrity’ of the situation” (p. 34).

Participan Observer

Pinar et al (1996, p. 60) and Janesick (1991, p. 103) both indicate that participant observation is one of a number of methods used in ethnography. Others methods include observations and interviews (Janesick), documentary analysis, ethnomethodology, and analysis of artifacts (Pinar et al. 1996, p. 60), to name a few. Cohen and Manion (1995, p. 107) outline two types of observers: participant and non-participant observer. Bogdan and Biklen (1998, p. 81-83) see a continuum from complete observer to complete involvement, while Janesick (1991, p. 105) describes four types of observation: total, mid-range, passive, and “non” participation.

The observations can be gathered using fieldnotes, interviews (both formal and informal), and collections of other documents or artifacts including photos and videotapes. The researcher is the main instrument of observation (Sanday, 1990, p. 20). However, Agar (1980) suggests that participant observation is a good “cover term” for all of those activities. “The term suggests that you are directly involved in community life, observing and talking with people as you learn from them their view of reality” (p. 114). So where does my research fit into the ethnographic paradigm and the activity called participant observation?

This study of Jubilee School certainly looks as though it is ethnographic: I carried out my fieldwork in a school over an extended period of time. My goal was to capture a wholistic picture of the group being studied: in addition, it involved personal relationships, as I was the principal of the school and the researcher at the same time. However, while it appears to have much in common with ethnographic research, as Sanday (1990, p.19) and Janesick (1991, p.104) indicate, fieldwork is usually carried out in a “strange place” and the ethnographer is typically an outsider to the group. This certainly does not describe my relationship to the research. As well, fieldnotes were not my main data collecting method (Agar, 1980, p. 111), as I used mostly interviews. So this may not be a “pure” ethnographic study but it does have the “flavor” of one.

My perspective and position in this study has problematized my attempts to identify what kind of study I am carrying out. I certainly have an “emic” or “insider’s perspective of reality” as opposed to the traditional “etic” or “external, social scientific perspective on reality” (Fetterman, 1989, p. 30-32). Thus, in many respects, I am a participant observer. But again, this is not quite as straightforward as it seems. Although I was a participant, as principal, in the overall workings of the school under study, and the process of action research, I did not teach in any of the large group classrooms I describe and interpret here. In this way, one might argue that I am more an
observer than participant. As Cohen and Manion (1995, p. 107) indicate, a participant observer is engaged in the activity, not standing aloof (non-participant). Thus, in terms of classroom activity, I would be a non-participant or somewhere between mid-range and passive on Janesick’s (1991) continuum.

I believe that my current research study sits somewhere in an ethnographic orientation, along an etic and emic perspective continuum, and generates a descriptive and interpretive product. Thus, as Short (1991) suggests, my research may be understood in relation to an “integrative/narrative” form, which is “...multidisciplinary or transdisciplinary in character, and well suited to the kinds of holistic questions posed in curriculum” (p. 15).

**Action Research**

Another possible confusion is whether or not my inquiry is action research and, if so, what type of action research? Is it a description of the process or a report of the results? As Sagor (1992, p. 8) states, is it “research for action” (understanding), “research in action (monitoring),” or “research of action (evaluative)?” I will deal with these questions by defining action research as curriculum inquiry and then locating this project in this area of study.

The historical threads of action research begin with the work of Kurt Lewin and Stephen Corey in the 1940s, and later with the work of Lawrence Stenhouse and John Elliott in Britain in the 1960s. The influences of Joseph Schwab and Donald Schon in the United States in the 1970s were also significant. More recently, action research has been revived as “teacher research and reflective practice” (Hollingsworth and Sockett, 1994, p. 3-7). As Pinar et al. (1996) state, this period was part of a movement to bring curriculum research closer to the practitioner (p. 54).

Action research has many variations depending on the goal, focus and historical and philosophical underpinnings of a given approach. It includes such notions as “understanding one’s social and educational situation”, “doing something to improve a situation”, “collective self-reflection”, and “democratic and collaborative perspectives” (Carson, Kanu, and Stanski, 1993, p. 1). Pinar et al. (1996) indicates that action research occurs when “...researchers and teachers form collaborative relationships to make curriculum change” (p. 54). Carson et al. provide a very practical definition that I feel fits this educational situation. They state that “action research is an attempt to inquire into our educational situations, understand them better and act to improve them” (p. 1). The process or steps can vary from one researcher or research group to
another. However, the following steps appear to be the common to most action research initiatives. The process starts with the recognition that a problem exists, the collection of data and formulation of a plan follows, action and observation are carried out, and the cycle is concluded with reflection and preparing for more action. A comparison of several methods is outlined in Appendix F.

Before I relate this to my research, I use the work of McKernan (1991) and Reason (1994) to outline a few varieties of action research. Lewin is considered the “father” of action research and helped develop the first branch called “scientific” (McKernan, 1991). This form is experimentalist and typically involves external experts working with internal partners. This form is also characterized by the use of needs assessments and the application of social scientific methods (p. 309-311). Reason (1994) calls this form “action science or action inquiry” (p. 329). The second form is “critical” (McKernan) or “participatory” (Reason). This type has its roots in critical discourse and the process is secondary to collaboration and dialogue. It “…is political because it is about people changing themselves and their circumstances and about informing this change as it happens” (McTaggart, 1997, p. 7). The third form is called “practical” (McKernan) or “cooperative” (Reason). Usually it is very practitioner orientated and more practical than theoretical. These categories are certainly arbitrary and, as McKernan states, any form has a little of each.

I believe the form of action research that was carried out at Jubilee School was cooperative / practical. As McKernan (1991) indicates, the process is “…initiated by teachers and other educational practitioners in response to a practical problem confronting them” (p. 313). It “…is a strategy more likely to be successful with a group of people who experience themselves as relatively empowered and who wish to explore and develop their practice together” (p. 405). This describes the actions taken by the staff at Jubilee and our wish to change our working reality, the traditionally dysfunctional junior high school. We were encouraged and empowered by a school divisional professional development initiative (Butt and Townsend, Raymond, 1990) that called for ongoing school based, staff development projects. In one sense, adds to the uncertainty of how this thesis fits into an action research framework.

The focus of this research is to describe the effects of the action research project at Jubilee School, which was the development of long term relationships in a large group classroom setting. The process was already under way when I decided to use this case as a focus for my
thesis. According to McKernan's (1991) procedures or steps, the staff at Jubilee had already completed step one — "recognition, definition, and clarification of the problem", step two — "needs assessment/situational analysis", step three — "action hypotheses / ideas / practical solutions", step four — "development of the action plan", and step five — "implementation of the action plan" (p. 315-318). It is at this point that I began to collect my data by interviewing, observing, and collecting documents. So it would seem that this thesis fulfills the final steps of this action process, step six — "researching and evaluating the action plan", step seven — "reflecting, explaining, and understanding the action taken", step eight — "recording and disseminating results", and finally step nine — "revision of problem: implementing in second action cycle" (p. 318-320).

However, the final step is not explicit in my purpose for writing my thesis. In other words, my thesis is really a secondary outcome with a distinct purpose outside the action research at Jubilee school. Although the staff and I are interested in the results as participants, it is written to complete my doctoral program. The fact that I have left Jubilee School for the last two years and am no longer a participant in any action at the school, means that this report may or may not influence the staff at the school in their next cycle of action (step nine). In fact they were already taking a different tack away from the large group classroom to block timetabling well before this thesis was disseminated. On the other hand, the staff did reflect, explain and help understand the action (step seven) as I shared in the collection and reporting of my data with the teachers I had interviewed. So it certainly has had some influence on them, although not as an official report. I hope that when they receive their copy of the thesis, it will add to their accumulated knowledge or praxis and at an individual and staff level provide them with new information to inform their ongoing cycle of teacher improvement. Sagor (1992) states that the reporting of action research is not only practical, but also critical for the group involved. In disseminating important findings we assist other educators by providing them with "fresh insights" for their practice, and as well it "reminds ourselves and tells others that our work is important and worthy of consideration" (p. 64). So this thesis could fulfill that role (dissemination of information about praxis), what Reason (1994) calls "presentational knowledge" (p. 326).
**Location of research**

To conclude this section on the description of the nature of this study, I believe it is complex and holistic. It is difficult to examine only one aspect of the change process that occurred at Jubilee School without distorting it and leaving out important contextual details. Thus, the inquiry doesn’t fit neatly into any one genre. It “...is what multi-method research is all about: the use of a variety of descriptive and analytic tools, and the attempt to find their intersections” (Miles and Huberman, 1990, p. 345). I believe it has an ethnographic component insofar as I am a participant observer in many aspects of the study. I use predominantly formal interviews to complement my observation and document collection in order to record the results of the action research project. I use a narrative analysis to tell the story. This description may seem convoluted and complex but, then again, the culture and action in a school, especially a junior high school, is never simple.

**Implementation Choice / How did I conduct the Data Collection?**

**Introduction**

In this study, I use interviews, document collection and classroom observation. These techniques were informed and guided in general by the works of Cohen and Manion (1995), Fontana and Frey (1994), Merriam (1988), Marshall and Rossman (1995), and Seidman (1991). The previously mentioned multiple methods of collecting data, a form of triangulation, will help provide a more holistic view of the case study and is a way of ensuring a form of validity and reliability. As Merriam notes, “The opportunity to use multiple methods of data collection is a major strength of case study research...” (1988, p. 69).

**Case Study**

I have chosen a case study strategy for my doctoral research. My personal background and bias have influenced my decision but, more importantly, the fact that I wished to research the holistic changes to the structure and organization of a school has led me to choose a case study method. “A qualitative case study is an intensive, holistic description and analysis of a bounded phenomenon such as a program, an institution, a person, a process, or a social unit” (Merriam, 1988, p. xiv).
Hamel, Dufour and Forin (1993) indicate that case studies are not limited to just one qualitative genre but, in fact, have had a history of use in sociology and psychology. Thus, the previous discussion was important in order to place the case study under a methodological umbrella. In fact Hamel et al. (1993, p. 1) suggest that a case study is an approach not a method. Stake (1994) indicates that a “case study is not a methodological choice, but a choice of object to be studied” (p. 236). In this case, Jubilee School’s large group instruction project is the subject of the inquiry. I will be discussing this particular case in more detail in the next section but I would like to outline the reasons why the use of a case study matches this research project.

The case study approach is said to be useful in capturing the process and meaning of a case. It involves fieldwork and uses the researcher as the primary instrument for data collection (Merriam, 1988, p. 18-19; Donmoyer 1990, p. 194-195). I will be the instrument of this study as I am a participant, the principal, and the researcher. Case studies are also useful in researching complex, real situations involving change and many variables. Jubilee exemplifies these characteristics, and the case study approach also provides the opportunity to provide a holistic view of the school in the process of change. As Cohen and Manion (1995) state, it allows for the search of themes in “...the warp and weft of everyday life” (p. 114).

Shaw (1978) states that case studies “…concentrate attention on the way particular groups of people confront specific problems, taking a holistic view of the situation. They are problem centered, small scale, entrepreneurial endeavors” (cited in Merriam, 1988 p. 11). This is exactly the case at Jubilee Junior High School. The staff and I have tried to address our concerns about the quality of education at our school by introducing a unique and innovative program that was developed and modified by ourselves. I believe this can be easily understood as a small scale, problem solving, creative activity. L. M. Smith (1990) believes that a case is “intact”, “natural” and “ongoing” versus some kind of sample set of pupils, teachers curricula or schools (p. 11). Again, the large group project at Jubilee School fits these criteria.

A case study can provide a holistic interpretation of the project at Jubilee, and as Marshall and Rossman (1995) outline, it is exploratory and descriptive and stress “... the importance of context, setting, and the participants’ frames of reference” (p. 44). I see the opportunity to provide a “thick” description of the Jubilee School story as helpful to those teachers, students and parents involved in the change and other educators who may gain insight into their own practice from the account. This does not mean that case studies do not have their disadvantages and
challenges. Some of these potential problems are discussed under the headings of “Generalizability” and “Establishing the Writer’s Personae” in later sections of this chapter.

**Access.** One of the concerns of a research project involving schools and classrooms is the need to negotiate entry or access (Marshall and Rossman, 1995, p. 61). This usually requires knowing or convincing someone in a position of authority, to solicit the participation of a teacher or teachers. In the current situation, I was already in the school and I was in a position of authority. However it did not mean my task was necessarily straightforward. I did indeed have the “inside track”, so to speak, and was a participant in the object of the research, but I still needed to first asked the Superintendent of Schools for permission to conduct this research. He was more than pleased to have me conduct this research as he had been one of our strongest supporters from the beginning. I also had the moral and ethical obligation to gain the acceptance of the other participants, namely the teachers, students and parents in the teams.

**Interviews**

Interviews were the major data collection method. “Combined with observation, interviews allow the researcher to understand the meaning people hold for their everyday activities” (Marshall and Rossman, 1995, p. 81). The following section outlines the why, who, what, where, when, and how of the use of interviews. I also discuss the results and challenges of this method of recording participants’ stories.

**Why did I interview?** Interviews are used in ethnographic case studies as they help provide an in-depth description of events in the classroom. I needed to literally record participants’ voices as they were the “experts” in this situation and interviewing them was my major choice of data collection. I was attempting to construct a story that could capture all aspects of our eight year project. As Seidman (1991) states, interviews are an important method when “the goal is to have a participant reconstruct his or her experience within the topic of study” (p. 9).

As researcher, I wished to collect first hand information from the participants in some form. Our interviews or oral interchanges were more like a conversation than a simple series of questions and answers. In contrast to structured interviews, I wanted to create an atmosphere of trust. I attempted to establish “...a human-to-human relation with the respondent and the desire to understand rather than to explain” (Fontana and Frey, 1994, p. 366). In order to understand
one must be in a long and in-depth conversation with the participant. As noted by Yonemura (1982), "out of these reflective, supportive conversations a clearer identification of the practical principles guiding teachers can be formulated" (cited in Connelly and Clandinin, 1988, p. 51). My goal was to create a narrative. In interviewing the teachers I realized that a “conversation as a research method is very likely to yield stories as data” (Florio-Ruane, 1991, p. 240). “As a method of inquiry, interviewing is most consistent with people's ability to make meaning through language” (Seidman, 1991, p. 7).

Prior to the Jubilee School project I had already acquired some experience interviewing people in a research setting. My Masters’ thesis was based on a case study in which I interviewed over thirty participants. However, in order to update and refresh my interview skills, I conducted a small pilot project using my research questions. The process was to provide a sample to my thesis proposal committee, each of whom provided me with feedback. I then developed the final questions guided by Merriam’s (1988) suggestions for asking effective questions and recognizing that “determining the type of information desired – opinion, experience, feeling, knowledge, sensory, or demographic – aids in deciding the type of question to ask” (p. 81).

I wished to write a narrative, a story about the teachers’, students’, and parents’ feelings, opinions and reflections of their experience during the three years of team teaching in large group instruction. Thus, my questions ranged from open-ended questions about the changes they had experienced, in the first round of interviews, to questions which probed how their perceptions had shifted over time, in the second, and to stories in the third round. During the interview process, I reminded myself of Seidman’s warning, “use an interview guide cautiously” (1991, p. 69). I was not trying to find common agreement between participants per se but rather to recount a story, and thus the questions were “...designed to ask participants to reconstruct their experience and to explore their meaning” (p. 69).

Finally, I also had a teacher (not involved in the project) interview me before I started. My perspective is certainly part of the journey of the Jubilee team. This process of being interviewed is very important in two ways. First it highlights my own point of view so the reader of the report can judge my bias in relationship to the research findings. Second, it ensures that I, as a researcher, truly remain a participant. As Hunt (1987) states:

... I have known very few researchers who have taken the time to “run themselves” as subjects. Becoming a participant in your own research project is a
very valuable source of feedback for tuning into whatever methods are used -- the Golden Rule in developing research methods. (p. 118)

**Who was interviewed? / Selection of participants.** The selection of teachers was relatively uncomplicated. I interviewed all the teachers who were involved in the team-teaching, large group instruction project for at least two years. There were twelve teachers in total. Their total number of years spent in the team-teaching large group setting ranged from two to six. A summary of their experience and other demographic information is outlined in Appendix G.

The superintendent was also interviewed because he could provide a wider perspective of the events surrounding the story of the Jubilee project. In addition, he had a historical perspective on Jubilee School and the school division, as he had been the superintendent for many years prior to the project. The two board members were chosen because they were the local representatives, while the other five members of the Board of Trustees were from communities outside the Jubilee School area. The two members in question were members of the Board of Trustees during the entire eight-year period of the Jubilee project, including its inception.

Finally, the students and parents were taken from a pool of about two dozen students and parents who volunteered and agreed to take part. The teachers had asked students and parents if they would like to be involved in the interview process during student-led parent / teacher conferences. I then gave each student or parent who came forward a letter of request (Appendix H), a consent letter (Appendix I), and a guide for the interview questions (Appendix J). I asked the student to discuss it with their parents and then return the consent form to me. Only after a consent form had been signed and returned would I arrange an interview. Of the approximately two dozen letters sent home, only eight students and seven parents came forward and were interviewed.

**What kind of interviews?** There are a number of terms used to describe the type of interview that I conducted with the teams of teachers and the teachers, students, and parents individually. Merriam (1988) outlines standardized, semi-structured and unstructured interviews. Her definitions depend upon the open-endedness of the questions and the flexibility afforded to the interviewer. Fontana and Frey (1994) list structured, group, and unstructured, while Marshall and Rossman (1995) include phenomenological and elite, along with focused group. Cohen and

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21 By the time I interviewed the students and parents, two large groups had finished Grade 9 and were at the high school. I sent letters to the students and I had already interviewed two parents.
Manion (1995) call the unstructured interviews "non-directive". I would have to say my interview experiences, which were different at each stage, were a combination of "...all three types of interviewing so that some standardized information is obtained, some of the same open-ended questions are asked of all participants, and some time is spent in an unstructured mode so that fresh insights and new information can emerge" (Merriam, 1988, p. 74). Interviewing was an evolving process.

In particular, the individual interviews with teachers were in-depth, semi-structured, using a general interview-guide approach as outlined in Patton (1990). In the first round of interviews, I provided the teacher with a set of questions prior to the interview and I used them (Appendix J) as a guide. I was flexible and pursued questions and responses as the participant expanded on their experience. The second set of interviews, for teachers only, focused on their reflection on the first set of transcripts (which were provided at least two weeks in advance). This interview was much more open, with questions asked about any change in their perceptions22 about team teaching in the large group setting (see cover letter, Appendix K). In the third round of interviews, we reviewed the second set of transcripts (which the teachers required no less than a month in advance) and focused on stories and anecdotes.

I also conducted one group interview with each team of teachers, which was guided by my notes of the "official" observations of their classroom and the set of questions (Appendix J). Again, it was a semi-structured interview as the group dynamics and thoughts generally directed the conversation. The group interviews provided a wider perspective than the individual interviews and some insights into and comparisons to the individual teacher interviews (all group interviews occurred prior to the individual interviews). As Fontana and Frey (1994) state,

The use of the group interview is not meant to replace individual interviewing, but it is an option that deserves consideration because it can provide another level of data gathering or a perspective on the research problem not available through individual interviews. (p. 364)

Finally, the interviews with the superintendent, two board members, students and parents were semi-structured and based on a set of questions (Appendix J) provided to them prior to the interview.

22 In almost every situation the teacher was in a different stage of the three-year process. For example, three teachers in one group were interviewed in their first and second year of a three year cycle, while another team was interviewed in the last year of three years and then when they
Interviews occurred over a period of two years. An example of one team’s schedule is presented in Appendix L. The first round of classroom observations was followed by a group interview. The first round of interviews of each of the twelve teachers and groups began in the fall, 1996 and concluded in June, 1997. The second round of interviews, which included twelve teachers, students, parents, the superintendent, and board members occurred between April and June, 1998. The third and final round of interviews, which involved teachers only, occurred in December, 1998.

**How were interviews organized and conducted?** The first interview of all participants began with a review of the letter of explanation and the signing of the consent letter (Appendix I), which participants had received prior to the interview if they had given preliminary agreement to their involvement. I emphasized the fact that even though I was the principal of the school, they had the option not to participate and could withdraw at any time (this was an important part of my OISE requirements and the ethical review). I then asked them if they objected to being tape-recorded. There was no doubt in my mind that I needed to tape-record the interviews. My goal was to record a narrative with the substantial use of the voices of the participants, and thus, I needed a complete record of our conversation in order to write the story. Almost all authors of research methodology recommend tape-recording. Some recommend taking notes during the interview. I found that other than making mental notes on the question guide sheet, taking notes distracted me from listening attentively and would distract participants if I had to ask them to repeat anything that I could not write down fast enough. Fortunately, no one refused to be recorded. All seemed to ignore the tape recorder within minutes of the start of the interview.

Both Seidman (1991 p. 10) and Lather (1986, p. 264) recommend that a three-interview series be used in order to develop a relationship between participant and researcher and also in order to get an in-depth description of their experiences and reflections. Such a strategy provides the researcher with the ability to “give back” to the participants, in the form of either transcripts or impressions of the previous interview. Thus, it truly becomes a long-term conversation where impressions can be clarified and a rapport built. It also helps the researcher clarify the internal validity of the participants’ recollections, as ideas are compared across the three interviews and, accordingly, it serves as a form of triangulation. But in every research project there must be a compromise between too much depth (number of interviews) and breadth (number of participants

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had moved to their own individual classroom the next year.
interviewed) or too little (Marshall and Rossman, 1995, p. 81). In this case I have erred on the side of too much. I could have done a case study on one team but I was more interested in the whole story of the team teaching large group classroom project at Jubilee School. I chose to interview all the teachers involved (breadth) and conducted long-term interviews (depth). As for the students and parents, those interviews, although not as in-depth as the ones with teachers, were meant to add another perspective of the story and, ideally, deepen the narrative account.

**Results / Transcripts.** The end product of all the hours of interviews was the typed transcripts. A professional typist transcribed the first round of interviews. After they were complete, I went back over the transcripts while listening to the tape to ensure accuracy of the transcription. Then as Seidman (1991) and Lather (1986) both suggest I returned, "gave back" the transcripts to all participants and asked them to review them for accuracy and add any other thoughts they wanted to add (Second Interview Letter in Appendix K). I found this "member checking" process an important step insofar as it consolidated our conversation and shared perceptions to that point and led into the second interview. I transcribed the second round of teacher interviews and those conducted with parents, students, superintendent and board members. Again, upon completion, I listened to the tape while making corrections to ensure accuracy. This second round of transcripts was sent by mail to the participants with an accompanying letter (Appendix M). For the parents, students, superintendent, and board members I provided a self-addressed, stamped envelope with the transcript that would allow them to return any comments or revisions. I conducted the third round of interviews with the teachers in December, 1998.

Seidman (1991, p. 86) suggests one should separate the interviewing and analyzing. However, one can never completely do so, because as you begin your research project, you begin thinking and reflecting on what you are researching. Over the two years of collecting data and living as a participant in the research project, I was constantly thinking about, making notes, and adjusting my practice to meet the flexible and changing nature of a school and the life in a classroom. I discuss the analysis and reporting under separate headings later in this chapter.

**Challenges / Precautions.** Length, time of day, and spacing are all considerations for interviewing. I believed that the interviews should be in the one-hour range, which is long enough to allow for a detailed conversation but not so long as to be tiring or tedious. This was

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23 I had moved to Toronto by this time and was in residence near OISE.
especially true as most interviews occurred after a full day of teaching for both the participant and researcher. As for the spacing over two years, I believe it was beneficial to the study as it provided an opportunity for the participants and the researcher to reflect and recount experiences over time. It also allowed for changes in perspective to be recorded as teachers went through the transition of the three-year team teaching cycle and into other types of traditional teaching patterns.

Because the goal of unstructured interviewing is understanding, it becomes paramount for the researcher to establish rapport. He or she must be able to put him- or herself in the role of the respondents and attempt to see the situation from their perspective, rather than impose the world of academia and preconceptions upon them. Close rapport with respondents opens doors to more informed research. (Fontana and Frey, 1994, p.367)

As principal for eight years, I had set a goal with the staff to build a collaborative, reflective culture. The team teaching large group project was a key component in that process. Thus, I had already developed a more in-depth collaborative relationship with the teachers than most “outside” researchers would be able to achieve. My insights would help me in questioning the teachers, as I knew them in a wider context of time and situation. They would also have a similar understanding of me as both the principal and a community member. In addition, the series of three interviews and countless other informal discussions about classroom life would continue to enrich the relationship and deepen our understanding of the phenomenon we were living. For the parents and students, the rapport was certainly not as close but, in all cases, the participants had known me as principal, for at least two years. I certainly wasn’t a stranger, but I was the principal. As a result, I worried less about being an outsider and more about the way in which my position of authority might influence their conversations with me. I can not know for sure whether or not they told me what they really thought. However, the fact that they volunteered to be interviewed appears to indicate that they were not telling me things that they did not feel comfortable telling me as principal. I discuss this possible problem of truthworthiness in a later section.

The personal qualities and abilities of the interviewer are important in research. Marshall and Rossman (1995) state “interviewers should have superb listening skills and be skillful at personal interaction, question framing, and gentle probing for elaboration” (p. 81) while Merriam (1988) summarizes the ideal interviewer characteristics as “…tolerance for ambiguity, sensitivity, and communication skills” (p. 41). It would seem to me that any educator working in
schools would need to develop and hone these “people” skills. These “people” skills aside, research interviewing tends to be unique and challenging. I had to constantly monitor my interview technique and modify my approach as I proceeded through the three rounds of interviews.

Although these skills are important, they are not all a researcher must consider while interviewing. Seidman (1991) wisely advises that “technique isn’t everything”. He makes a number of recommendations that I used to monitor myself as I carried out the series of interviews. He suggests “listen more, talk less”, “explore, don’t probe”, “don’t interrupt”, “ask participants to tell a story”, “ask open ended questions”, “share experiences on occasion”, “follow your hunches”, and “tolerate silence” (p. 56-71). All of these suggestions were helpful but I was not always perfect in heeding them. For example, I sometimes would get involved in a two-way conversation where I would share ideas with the teacher, but again my role as participant, principal, and researcher was a constant balancing act. All I could do was reflect and act on my reflections after each interview and utilize my new insights to inform my method in the next. Seidman also suggests that another way to gauge and improve your interviewing and listening skills is to transcribe an interview tape. Although I didn’t transcribe the first round of interviews, I did listen to them twice, while ensuring accuracy and making corrections. This helped me critique my interviewing technique prior to the second round. Transcribing the second round of interviews also helped me with my third and final round of interviews.

Seidman (1991) warns about becoming too “mechanical” or using “formulaic approaches” in the interviewing of participants in an effort to ensure validity and trustworthiness. He does not suggest that these approaches are less important, but instead suggests that we strive for an “…understanding of and respect for the issues that underlie those terms. We must grapple with them, doing our best to increase our ways of knowing and of avoiding ignorance, realizing that our efforts are quite small in the larger scale of things” (p. 19). We need to balance the structure of the interview with the flow of the conversation. “Effective questioning is so context-bound, such a reflection of the relationship that has developed between the interviewer and the participant, that to define it further runs the risk of making a human process mechanical” (p. 70). I found, like Seidman (1991) and Hunt (1987), being interview helped me to understand the process more personally and reflect on the questions. In the end, as Merriam (1988) states, “the
investigator is left to rely on his or her own instincts and abilities throughout most of this research effort" (p. 34). Seidman summarizes:

The most important personal characteristic interviewers must have is a genuine interest in other people. They must be deeply aware that other people's stories are of worth in and of themselves and because they offer something to the interviewer's experience. With a temperament that finds interest in others, a person has the foundation upon which to learn the techniques of interviewing and to practice the skills. (p. 71)

I definitely was interested and this guided my interviews

**Other Documentation**

The main purpose of collecting documents from a number of sources was to help me write the story. I used my observation notes, document collection, and personal journals to help me remember incidents and events, clarify reactions to those events, and complement the information provided in the transcripts of the interviews. As Connelly and Clandinin note, "The sense of the whole is built from a rich data source with a focus on the concrete particularities of the life that create powerful narrative tellings" (1990, p. 5). The following are the three other sources of documentation.

**Observation notes.** There were two main reasons for conducting an "official" classroom observation. I use the word "official" because in my role as principal I had visited the classrooms of the teams on hundreds of occasions, usually on an informal, "drop in", or short-term basis. Thus, these "official" observations were a way to add to the narrative and description of the team teaching classroom. "It gives a firsthand account of the situation under study and, when combined with interviewing and document analysis, allows for a holistic interpretation of the phenomenon being investigated" (Merriam, 1988, p. 102). Second, I used them to help frame the subsequent group and individual interviews. As Marshal and Rossman (1995) indicate, "the value here is that the researcher is able to discover the recurring patterns of behavior and relationships" (p. 79). These patterns would inform the questions asked at the interview and the subsequent analyzing and reporting of the narrative. My observations and notes were a form of "active recording" that added to the depth of description given by the teachers (Connelly and Clandinin, 1990, p. 5).

"Official" classroom observations were conducted over a period of time beginning in the fall of 1996 and ending in the spring of 1997. Those observations were documented in an
observation log. Not only are my classroom notes included, but post-observation reflections from the teachers and myself. Each set of "field-notes", collected over three days of observation were the focus of the group interview that followed. They also informed me prior to the individual interviews (Appendix L outlines an example of an Interview and Observation Schedule).

**Personal journal and log book.** I kept a journal and a logbook for two reasons. First, it is a source of data in the telling of the Jubilee Story as I was a participant and my voice will naturally be part of the narrative. Cooper (1991) states, "a notebook, a diary, or a journal is a form of narrative as well as a form of research, a way to tell our own story, a way to learn who we have been, who we are, and who we are becoming" (p. 98). Merriam (1988) states, "personal documents are a reliable source of data concerning a person’s attitudes, beliefs, and view of the world" (p. 112). Thus, as I was writing a narrative that is partially about me, my journal is an essential component of the documents collected. Second, as Connelly and Clandinin (1988) and Merriam (1988) indicate, the journal is a reflective tool. In the process of collecting data and in my own endeavor to monitor my role as both participant and research, my journal allowed me to record my feelings and emotions as I conducted the research. It also permitted me to grapple with the issues of validity and reliability.

**Documents.** The collection of documents during the research project was mainly to supplement the interview data. Merriam (1988) states, "documents of all types can help the researcher uncover meaning, develop understanding, and discover insights relevant to the research problem" (p. 118) and "ground an investigation in the context" of the study (p. 109). That certainly was true in my case since the documents gathered, many on a hunch or intuitive belief that they might come in handy, turned out to be useful as I wrote the narrative. In particular, they enabled me to clarify dates, events, and people’s perceptions. In fact, excerpts from these documents added vivid details to the narrative. As Marshall and Rossman (1995) indicate, reviewing documents during the analyzing stage is an "unobtrusive method" and "...one rich in portraying the values and beliefs of participants in the setting" (p. 85). I found them to be useful and they provided a voice for many people who I could not interview.

I collected a wealth of documents to augment the interview transcripts, observation notes, and personal log. The documents included: theses of educators describing significant events overlapping and interwoven into the Jubilee Story; newspaper articles; letters from parents and students; observation notes from meetings; written surveys and comment sheets; school policies;
teacher planning materials; lesson plans; student assessment documentation; student portfolios; and video recordings of student-led conferences. All these resources helped clarify and enrich the descriptive stories of the teachers.

In conclusion Marshall and Rossman (1995) state:

> It would be entirely appropriate, however, indeed recommended, for the researcher to modify the research proposal if an exciting and significant focus emerges from early data collection. In fact, the primary strength of the qualitative approach is this very flexibility that allows, even encourages, exploration, discovery, and creativity. (p. 106)

As suggested above, I needed to be flexible and did find times when, more by luck then good planning, I was able to gather data that would prove useful in the writing of the story. The wealth of documentation that I did collect was probably more then I needed to successfully complete this research project but it certainly has provided a form of triangulation, a kind of external validity to the narration. More importantly, it has enabled me to give a voice to many participants not interviewed. As Plummer (1983) indicates, life documents “... attempt to enter the subjective world of informants, taking them seriously on their own terms and thereby providing first hand, intimately involved accounts of life” (p. 14).

**Organizing data.** As previously mentioned, the three rounds of taped interviews were transcribed and checked by the participants. Each participant’s transcripts were assigned a separate folder, then represented by a letter of the alphabet and given a pseudonym. For example, teacher “A” would be represented by the letters “TA” and the pseudonym “Alfred” (first letter of the name corresponding to the letter assigned to the teacher). Each page of the transcript would be labeled. For example, “TA1p.2” would represent teacher A, interview 1, page 2. Students were represented as “SAp.1”, student A, page 1 (and parents as “P’). These markers were used to sort verbatim quotations so they could be traced back to the original transcript. The markers are also used as a reference for the quotes included in the narrative dialogue in both Chapter Four and Chapter Five. A second copy of the labeled transcripts was also made in case of loss or disorganization of pages. Once the pages had been labeled, I reread the transcripts and made summary notes. I highlighted some of the comments that seemed important. Each entry was placed on an index card under specific topics of interest or story line items, such as Teacher – Teacher Relationships or Present Story. The highlighted comments were cross-referenced by placing the transcript page number on it.
I began the writing of the narrative by creating a chronology, a linear list of dates and events. I went through all my documents to check dates and events. I used the chronology as a time line along which I developed the plot, or story line. I sent this chronology to the teachers that I had interviewed by email and asked them to review it and reply to me with any comments about its accuracy. Then, using the index cards and documents collected, including my personal log, memos and newspaper articles, I began to sort, analyze and write. I describe this process in the following section.

**Interpretation and Reporting Choice / How I Analyze and Report?**

**Introduction**

The purpose of the study and nature of the research influenced the choice of format for analyzing and reporting the results. Shulman (1988) indicates that "...selection of appropriate methods is an act of judgment". "The best research programs will reflect intelligent deployment of a diversity of research methods applied to their appropriate research questions" (p. 16-17). However, the researcher's background and biases will also influence the choice of research design and must be "brought out" (Hunt, 1992) during the design, implementation, interpretation and reporting. "To be open to surprise" is part of the "research as renewal" philosophy espoused by Hunt and allows researchers to utilize personal qualities as "allies, not as enemies" (p. 129). As he observes "Unless the topic is close to their heart and central to their values, it is unlikely that they will sustain the energy required to complete the project" (p. 133). I believe I have made the appropriate choices for my work as I have chosen a topic close to my heart and an interpretation and reporting choice, which reflects my values. I have also remained open to surprise.

I have decided to report my findings in narrative form, using the journey metaphor outlined in Drake (1993) and Miller et al. (1990) in Chapter Four and the Story Model (Drake et al., 1992) in Chapter Five as organizing frameworks. This fits with the nature of my study, a story about a journey into the transformation of our school. As Connelly and Clandinin (1990) suggest, humans are "storytelling organisms" and this is how we naturally come to understand. However, they warn that it is not mere listening and recording of stories, but it is the collaborative exchange of stories that builds meaning. I plan to tell "...a mutually constructed
story created out of the lives of both researcher and participant" (p. 12). The next section outlines narratives in general and narrative analysis in particular.

**Use of Narrative Analysis to Analyze and Report**

**Rationale for using narrative.** The reason that I have utilized narrative as a form of reporting and analyzing is the power of the story. Noddings and Witherell (1991) sum up the effect of a story on research:

> Stories are powerful research tools. They provide us with a picture of real people in real situations, struggling with real problems. They banish the indifference often generated by samples, treatments, and faceless subjects. They invite us to speculate on what might be changed and with what effect. And, of course, they remind us of our persistent fallibility. Most important, they invite us to remember that we are in the business of teaching, learning, and researching to improve the human condition. Telling and listening to stories can be a powerful sign of regard – of caring – for one another. (p. 280)

There are other reasons why I chose narrative inquiry for my research. They include the use of collaborative approaches to telling and the action dimension of stories, all characteristics of the narrative approach.

The use of narrative in this thesis is a natural form for the telling of the Jubilee Story. Narratives have the qualities of a story that allow for the unfolding of the complex, unique, and interconnectedness of the relationships that are found in a school in flux (Carter, 1993, p. 6). A narrative is not a chronicle (Polkinghorne, 1995) or just a record (Zeller, 1995) but is the product of the research. Polkinghorne (1995) states the “outcome of a narrative analysis is the story” (p. 15). The narrative style allows for the collaborative telling of the story by all those involved. It is used to synthesize the parts, the individual vignettes, into a whole, a moving action narrative. It allows for a weaving of a tapestry of “…interlocking patterns of cultural / historical, individual / biographical, and interpersonal / relational threads” (Witherell, 1991, p. 84). It also features a temporal sequence or plot-line of past, present and future that mirrors the life of teachers and students in a school.

The use of story, narrative, metaphor, and dialogue in presenting the findings of this research project are in part due to the power of story. Connelly and Clandinin (1988) cite McIntyre (1981) who states “man” (sic) is “essentially a story-telling animal” (p. 24). Renee Fuller (cited in Ferguson, Coleman, and Perrin, 1990) believes that making stories may be
fundamental to human thinking. "The ability to comprehend a story – that is, to grasp meaning within a given context – may be more basic to human intelligence than anything measured by IQ tests. The need to make our life coherent, to make a story out of it, is probably so basic that we are unaware of its importance" (p. 2). Bruner (1986) implies that stories may be more compelling than information (p. 17).

I have found in my life and during my studies, that stories always catch my attention. When I read a book or article, one that is explaining an abstract concept or idea, and the author tells a story or gives a concrete example or uses a metaphor, I understand. I enjoy the experience, I usually "get it", I have an "ah, ha" moment. Noddings and Witherell (1991) agree. In Stories Lives Tell, Narrative and Dialogue in Education, they conclude that, "stories are tools of enchantment", "we use stories to explain", "stories can help us to understand", "stories motivate us", and "we learn form both hearing and telling stories" (p. 279-280). In fact, Pagano (1991) states that;

Teaching is textual. When we teach, we tell stories about the world. Some stories are scientific, some historical, some philosophical, some literary, and so on. Educational theories are stories about how teaching and learning work, about who does what to whom and for what purposes, and, most particularly, educational theories are stories about the kind of world we want to live in and about what we should do to make that world. (p.197)

I agree, as this research project is in fact a story about the experiences of a staff of teachers and the presentation of them is much more meaningful as a narrative. van Manen (1997) outlines the significance of the story to human science as something that “…enables us to experience life situations, feelings, emotions, and events that we would not normally experience” and “…allows us to broaden the horizons of our normal existential landscape by creating possible worlds” (p. 70).Farwell (1988) states “without story, we perish. Stories define our lives”, without them “ …our lives would be formless” (as cited in Cooper,1991, p. 97). Telling stories “is a way to impose form upon our often chaotic experiences” (Grumet, 1988, cited in Cooper, 1991, p. 97). The narrative, used to tell the story of Jubilee School, will bring form to the individual episodes and events that the participants and I experienced, reflected on, and recorded. The text created from the stories told allows others to experience it with us. I believe that narrative is the best way to present the data, our story.
Collaboration is a very powerful component of narrative inquiry. Marshall and Rossman (1995) indicate that “...there is open recognition that the researcher is collaboratively constructing the narrator’s reality, not just passively recording and reporting” (p. 87). Connelly and Clandinin (1990) see it as “a process of collaboration involving mutual storytelling and restorytelling as the research proceeds” (p. 4). Goodson (1995) adds that “...focusing on stories in context” develops a joint understanding and provides a “...dialogue of a story of action within a theory of context, a new context ... for collaboration” (p. 97). Narratives created collaboratively are “reflective” (Clandinin, 1985), have the ability to “resonate” (Florio-Ruane, 1991, p. 238), and create research that can reach practitioners. “Narrative structures provide a format into which experienced events can be cast in the attempt to make them comprehensible, memorable, and shareable” (Olson, 1990, p. 100-101). This research project is based on collaboration. It started long before the decision to officially (re)search it as a form of collaborative action research. The process from the beginning to its completion in the presentation of this thesis has been collaborative. I have shared the transcripts of the interviews with teachers, parents and students. There has been ongoing discussion throughout the process, as I was a participant in the school. Finally, I sought input from teachers by sending them a draft of the narrative and requesting comments (Chapter 4 and 5).

Along with the collaborative component of narrative inquiry is the fit with the action dimension of human activity in schools and classrooms (Goodson, 1995 and Polkinghorne, 1988). Carter (1993) summarizes, “the action feature of story would seem to make it especially appropriate to the study of teaching and teacher education” (p. 7). Zeller (1995) states that narrative “...provides a sense of immediacy of an event unfolding before the reader’s eyes”, and “while pure description presents the quality of an action story, narration provides the movement” (p. 76). In the case of this study, I believe there is abundant action and, because this is certainly true of other schools and classrooms, I hope our narrative will “resonate” with their experiences.

I believe, like Witherell (1991), that the “power of story and metaphor in offering up possibilities for human action and feeling” is essential for sharing of life, and teaching experiences (p. 94). The story provides us an opportunity to connect with the reader at an emotional level as well as intellectually. “We bring certain attitudes to those whom we don’t know: suspicion, mistrust, caution, and bias, or trust, openness, and welcome. Stories allow us to break through barriers and to share in another’s experience; they warm us” (Shabatay, 1991, p.
That is the purpose of this study, to share the experiences of a team of teachers in a long-term student-teacher relationship in a large group classroom. The story is told in an open manner and welcomes the reader to reflect on the possibilities of the Jubilee teachers’ experience. Couture (1997) believes “…that stories we tell are beginnings, not final destinations” (p. 115). They are starting points for further conversations or further retellings of stories, and that is one of the purposes of this research project.

Narrative knowing. The importance and use of story in human understanding dates as far back as human interaction itself. Knowledge of the world and the experiences that generated that knowledge were passed on from generation to generation through storytelling. “Narrative is a fundamental human activity – ‘international, transhistorical, transcultural: it is simply there, like life itself’” (Barthes, 1977, cited in Tappen and Brown, 1991, p. 174). It was not until the Enlightenment and the rise of scientific thought that a split emerged between the knowing that was passed on by narrative and that which science could prove. “This was the root of the text / interpretation distinction and the beginning of the observation / inference distinction. It is also, of course, the basis of the objective / subjective distinction that was to be so central in the writings of Immanuel Kant” (Olson, 1990, p. 106). The narrative way of knowing lost its importance in research and was suspect in the discovering and reporting of truth and theory. These two modes of knowing, paradigmatic (or logico-scientific) and narrative are contrasted by Jerome Bruner (1986). He states “…the paradigmatic mode leads to good theory, tight analysis, logical proof, sound argument, and empirical discovery guided by reasoned hypothesis”, while “…narrative mode leads instead to good stories, gripping drama, believable (though not necessarily ‘true’) historical accounts. It deals in human or human-like intention and action and the vicissitudes and consequences that mark their course” (p. 13). Carter (1993) sees “story as a mode of knowing” and “…a natural and common mode of thinking”. She suggests that humans have a “story knowledge” that is central to story thinking which “…captures in a special fashion the richness and the nuances of meaning in human affairs” (p. 6-7).

One other important characteristic is that “narrative focuses on making meaning of individuals’ experiences” (Hatch and Wisniewski, 1995, p. 116). Polkinghorne (1988) states “narrative is a form of meaning making” and narratives serve as a lens through which to recognize “the meaningfulness of individual experiences by noting how they function as parts of a whole” (p. 36). White (1981) indicates that narrative may be a solution to a human concern,
"...namely, the problem of how to translate knowing into telling, the problem of fashioning human experience into a form assimilable to structures of meaning that are generally human" (as cited in Tappen and Brown, 1991, p. 174).

As the scientific paradigm's predominant hold on research in the human sciences has been questioned, narrative as a methodological tool has gained prominence. Narrative has shown its power as "...an epistemological tool – as a way of knowing about ourselves and other knowers" (Witherell and Noddings, 1991, p. 9). As Olson (1991) expresses, "the skillful use of these forms constitutes an important form of thought. Narratives, oral and written, represent events in comprehensible form and thereby make those events into objects of consciousness, reflection, and analysis" (p. 101).

Polkinghorne (1988) summarizes narrative meaning as:

...one type of meaning produced by the mental realm. It principally works to draw together human actions and the events that affect human beings, and not relationships among inanimate objects. Narrative creates its meaning by noting the contributions that actions and events make to a particular outcome and then configures these parts into a whole episode. (p.6)

**Definition.** There are a number of definitions of narrative and a number of terms to identify this type of research approach. They include life history, life story, narrative, oral narrative, and storied narrative (Hatch and Wisnewski, 1995, p. 125). I will explore these terms and outline the one that seems to best describe this study. Marshall and Rossman (1995) explain that narrative is "an interdisciplinary method" and "...draws from traditions in literary theory, oral history, drama, psychology, folklore, and film philosophy, and views lives holistically" (p. 86). Clandinin and Connelly (1990) view narrative as "the making of meaning from personal experience via a process of reflection in which storytelling is the key element" and it is "...temporal, past, present and future and as in all storytelling is a reconstruction of experience" (p. 245). They also distinguish between narrative and story. They see narrative as both "phenomenon and method" and argue:

> to preserve the distinction we use the reasonably well- established device of calling the phenomenon "story" and the inquiry "narrative". Thus we say that people by nature led storied lives and tell stories of those lives, whereas narrative researchers describe such lives, collect and tell stories of them, and write narratives of experience. (Connelly and Clandinin, 1990, p. 2)

Polkinghorne (1995) in fact joins the terms together and calls this type of inquiry a "storied narrative". It is a linguistic form, "that preserves the complexity of human action with its
interrelationship of temporal sequence, human motivation, chance happenings, and changing interpersonal and environmental contexts. In this context, story refers not only to fictional accounts but also to narratives describing 'ideal' life events such as biographies, autobiographies, histories, case studies, and reports of remembered episodes that have occurred" (p. 7).

I believe that Polkinghorne (1988) comes closest to how I use narrative;

Narrative is a meaning structure that organizes events and human actions into a whole, thereby attributing significance to individual actions and events according to their effects on the whole. Thus, narratives are to be differentiated from chronicles, which simply list events according to their place on a time line. Narrative provides a symbolized account of actions that includes a temporal dimension. (p. 18)

Connelly and Clandinin (1990) seem to agree, and state the “meaning of the events and the plot which gives the explanatory structure” distinguish narratives from a chronology (p. 9).

The narrative in this study also can be identified using two other descriptors. First, it is historical (as opposed to literary or invented) because I tell the story of “real” past events. McGuire (1990) provides a suitable description: “historical narratives may be reports of actual events and real people, but they are not the things themselves. Historical narratives are inherently rhetorical: They do not present, but represent events and persons, they interpret” (p. 226). The narrative of this study is also both descriptive and explanatory since it does more than just describe the events of Jubilee school, it explains the happenings and reactions of the participants.

I believe that the narrative form of inquiry fits my belief system of what constitutes knowing and how we can come to understand the world we live in.

**Narrative analysis.** Although this study is a narrative, I believe it also can be designated as a narrative analysis. I utilize an article written by Polkinghorne (1995) to help clarify this distinction. Narrative inquiry can be understood as either an “analysis of narratives” or a “narrative analysis”. The first is based on paradigmatic reasoning and the subsequent analysis “...results in descriptions of themes that hold across the stories or in taxonomies of types of stories, characters, or settings”. The second is based on narrative reasoning and in the subsequent analysis “...researchers collect descriptions of events and happenings and synthesize or configure them by means of a plot into a story or stories (for example, a history, case study, or biographic episode” (p. 12). He further explains

Both share general principles of qualitative research such as working with data in the form of natural language and the use of noncomputational analytic procedures.
Although both types of narrative inquiry are concerned with stories, they have significant differences. The paradigmatic type collects storied accounts for its data; the narrative type collects descriptions of events, happenings, and actions. The paradigmatic type uses an analytic process that identifies aspects of the data as instances of categories; the narrative type uses an analytic process that produces storied accounts. (p. 21)

Both types use "diachronic data", contain "temporal information", and have a sequential relationship to events. "The data describe when events occurred and the effect the events had on subsequent happenings. The data are often autobiographical accounts of personal episodes and include reference as to when and why actions were taken and the intended results of the actions" (Polkinghorne, 1995, p. 12).

Narrative analysis in ethnographic work tends to be "bottom-up", creating versions derived from "content-dependent units to produce an infrastructure that explains the tale’s effect" rather than "top-down", where "the investigator begins with a set of rules and principles and seeks to exhaust the meaning of a text using rules and principles" (Manning and Cullen-Swan, 1994, p. 464). As Polkinghorne (1995) indicates the outcome of a narrative analysis is the story, and "the researcher is the narrator of the story, and often the story is told in his or her voice" (p. 19). McGuire (1990) agrees that "a narrator is more present within a narrative when using first person narration than third" (p. 229). Polkinghorne (1995) outlines the tasks facing narrative researchers. First they need to "develop and discover a plot that displays the linkage among the data elements as parts of an unfolding temporal development culminating in the denouement". Then they need to search "...for data that will reveal uniqueness of the individual case or bounded system and provide an understanding of its idiosyncrasy and particular complexity". The process "is actually a synthesizing of the data rather than a separation of it into constituent parts" (p. 15).

The analysis is a "retrospective" that links the data into a coherent whole. As Polkinghorne (1995) states, "the creation of the text involves the to-and-fro movement from parts to whole that is involved in comprehending a finished text" (p.16). Of course, in writing the story

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24 The other classification of qualitative data is synchronic. In this case the data "lack the historical and developmental dimension," and "provide information about present situation or belief of information". It offers "categorical answers to questions" (Polkinghorne, 1995, p.12).

or narrative it is not just any story but must fit the data; there is an interdependence between the story and the data. As Sass (1992) states “the researcher’s story should not only be useful; it should also be faithful to the actual historical happenings” (as cited in Polkinghorne, 1995, p. 20). “The function of narrative analysis is to answer how and why a particular outcome came about. The stories analysis is an attempt to understand individual persons, including their spontaneity and responsibility, as they have acted in the concrete social world” (p. 19). This certainly is the purpose of this research, to provide a narrative analysis of a very real place with all of the spontaneity of a junior high school in today’s world. In my narrative analysis I use diachronic data to craft the story from the bits and pieces of the documents gathered. As researcher and narrator I develop a plot and link the data by using the journey metaphor or story model. The process of fashioning the data into a holistic whole, a narrative, is the analysis. The story is faithful to the data that reflects the voices of the participants. It is a story of triumph, tragedy, sadness, emotion, caring, anger, success and failure. The story is real and expresses the emotions felt by the community that makes up the Jubilee School.

**Dialogic format.** The story is told in a dialogue or conversational format. It falls under what Denzin (1997) calls a “performing ethnography, the performance text” (p. 179). He states that ethnographies “...have narrators, drama, action, shifting points of view”; they “...make experience, concrete, anchoring it in the here and now”; and “...create space for the merger of multiple voices and experiences” (p. 181). I feel this will allow readers to better understand and identify with the voices being heard. It is also an attempt to help readers separate out my voice as participant and researcher from the other characters in this story: the teachers, students and parents.

Both Chapters Four and Five will take on the appearance of the script in a play. The use of dialogue as a form of story telling is as old as performing itself. However, the use of this method in qualitative research, particularly in education research, is less common. Some recent examples include Airini (1997), Bochner and Ellis (1996), Denzin (1997), Ellis and Bochner (1992), Haughey, Townsend, O’Reilly, and Ratsoy (1993), Hunt (1987), Lather (1997), McAlpine and Weiss (1999), and Threatt et al (1994). I believe the dialogue format provides an excellent vehicle through which to tell the story, express feeling, and provide a voice to others. In fact, Fine (1986) indicates that “science is performance” and, if expressed in this form, can be “a
science that takes the crisis of representation into account" (cited in Lather, 1997, p. 233). As Ellis and Bochner (1992) describe:

These separate accounts then transformed into a dialogic mode of narration that attempted to capture the processual and emotional details of what happened. Other people with whom we had consulted also wrote of their experiences during our decision-making process and thus provide multiple voices for the telling of the story. (p. 80)

I have used many different sources in my dialogue, both written and oral, and included different participants, among them, teachers, parents, students, and community members. Again, the dialogue format allows these varied forms and sources of communication, which occurred over eight years, to come together “...to (re) capture our sense of the context, players, perspectives, activities, and consequences over these many years” (McAlpine and Weiss, 1999, p. 5). Threatt et al. (1994) use this format to create a dialogue between teachers from across the country over time. I also wished to recapture the ongoing dialogue of the participants in the Jubilee Story across time and distances and, so, this format fit.

As mentioned previously, this retelling of the story is partial at best. I cannot capture the perspective of everyone who was involved in this complex organization. However, it is based on actual verbal and written accounts of many people. My account, like McAlpine and Weiss' account is “...a distillation of our many unrecorded conversations through the formal structure of a recorded dialogue [taped interviews]” (1999, p. 5). In the retelling of what happens to a person it is always a second hand account that is distilled through the mind and voice of the teller. Bochner and Ellis (1996) state, “...ethnography is a game played with words, and we know that written reality is a second-order reality that reshapes the events it depicts” (p. 26). This story is a factual account, told by me, but also incorporating the distinct voices of others. I have influenced the choice of dialogue and agree with McAlpine and Weiss (1999) who state, “although the editing process itself is an interpretive act, it was our [my] belief that the remaining dialogue run in its entirety would remain faithful to the holistic perspective of our conversation” (p. 7). By telling the eight-year story from many sources, including dialogue with participants, I have attempted to remain faithful to the holistic nature of the Jubilee Story.

Finally, as Ellis and Bochner suggest, “the act of telling a personal story is a way of giving voice to experiences that are shrouded in secrecy” (1992, p. 79). I believe the telling of the Jubilee Story will present a story that may not be totally secret, as much of what happened was in
public, but it is secret as it is unknown to those outside of the Jubilee community and only partially known by participants. I hope the retelling will inform readers. As Ellis and Bochner (1992) indicate, “readers are put in the position of experiencing an experience that can reveal to them not only how it was for us [Jubilee Staff] but how it could be or once was for them” (p. 98).

I also have something to learn in writing the narrative. “Understanding is not embedded in the experience as much as it is achieved through an ongoing and continuous experiencing of the experience” (p. 98). I have learned much in writing this narrative and believe that educators who narrate and perform their story can gain “… a perspective on our experience and a sense of what it meant that we did not have before” (p. 98-99). In the telling and reading, we can come to a deeper understanding of our experiences.

**Challenges to Scholarly Narrative Analysis**

Stories are not merely raw data from which to construct interpretations but products of a fundamentally interpretive process that is shaped by the moralistic impulses of the author and by narrative forces or requirements. And these interpretive elements operate regardless of who the author is. (Carter, 1993, p. 9)

Certainly I am no different than the author described by Carter. As both the researcher / narrator and participant / advocate, I have as many “moralistic impulses” as the next person. The following section will outline some of those impulses and challenges and explore how I worked through them. This is the place where, typically, the researcher would discuss, truth, subjective and objectivity, reliability, validity and rigor. I certainly do not ignore these important concerns. However, because this is a narrative analysis, these concerns need to be looked at through different lenses. The issues of rigor or quality of the research, truth, the subjective / objective duality of the researcher, the ability of the reader to use the research to inform them, and the ethical treatment of the participants are all important and, in my opinion, interconnected and dependent on each other. However, in order to deal with them here I have separated them into four sections: establishing fidelity [rigor]; researcher subjectivity / objectivity; generalizability; and ethics of caring.

**Rigor not ‘rigor mortis’ – Establishing Fidelity**

The rigorous pursuit of truth has long been the primary goal of the scientific community, and has often been the goal of the human sciences. The last few decades have certainly brought
about a dynamic debate over what constitutes quality in research. Eisner (1992) states, “insofar as our understanding of the world is of our making, what we consider true is also a product of our making. The history of science provides ample evidence that what we regard as true changes. It will, undoubtedly, continue to change as we are persuaded that other paradigms or frameworks are more attractive or more useful” (p. 14). Lather (1986) argues that although “truth” may not be singular, she opposes the “claim that empirical accountability either is impossible to achieve or is able to be side-stepped in praxis-oriented research programs” (p. 272). Wolcott (1990) agrees to an extent. He states “a preoccupation with validity may be as much a distraction to our collective efforts at qualitative research as it most certainly would be for me individually were I to set my course by it. That is not to dismiss validity but to attempt to put it into some broader perspective” (p. 148).

I believe this broader perspective is what Heshusius (1994) is discussing in her article “Freeing Ourselves From Objectivity: Managing Subjectivity or Turning Toward a Participatory Mode of Consciousness?” She fears that rigor in qualitative studies will become “another set of methodological rules” (p. 20) and thus, be externalized and objectified. “Somehow, any concept of rigor in relation to participatory consciousness must, in contradiction to past definitions, incorporate the need not to be in charge. One cannot fully attend to something in its own right, and try to be in charge of it, or of the self, at the same time” (p. 20). van Manen (1997) adds another perspective to the concept of rigor. He states:

rigorous scientific research is often seen to be methodologically hard-nosed, strict, and uncompromised by “subjective” and quantitative distinctions. “Hard data” refers to knowledge that is captured best in quantitative units or observable measures. In contrast, human science research is rigorous when it is “strong” or “hard” in a moral and spirited sense. A strong and rigorous human science text distinguishes itself by its courage and resolve to stand up for the uniqueness and significance of the notion to which it has dedicated itself. And what does it mean to stand up for something if one is not prepared to stand out? This means also that a rigorous human science is prepared to be “soft,” “soulful,” “subtle,” and “sensitive” in its effort to bring the range of meaning of life’s phenomena to our reflective awareness.” (p. 17-18)

There are many terms used to describe the concept of rigor. I have decided to utilize Blumenfeld-Jones’s (1995) concept of “fidelity”. I believe it encompasses the idea of rigor by developing two characteristics of fidelity, “believability” or faithfulness, and “betweenness” or exactness.
Believability and betweenness. Believability (similar to such terms as inner validity, trustworthiness, credibility) has the component of faithfulness\(^{26}\). Thus, the research must be faithful to the story and the participants or tellers of the story. This faithfulness to the telling is akin to “fulfilling a promise or completing an agreement”. It is a “triangular relationship” created among the interaction of the teller of the narrative and the participants, and the reader of the story.

This relationship focuses upon the tale and its objects and its personal significance as the object is invested with importance and meaning by both the teller and receiver. The exactness of reproduction aids in maintaining the relationship as both the teller and receiver of the narrative and its objects can agree to the quality of fidelity in the new image: “Yes, you seem to have captured what I see in it”. (Blumenfeld-Jones, 1995, p. 27)

Betweeness (similar to reliability, dependability) alludes to exactness. This means that the researcher attempts to create a match between the “real” story and the “told story”, in this case the Jubilee project and the narrative analysis in the thesis. It deals with the interdependent bond between the participant (teller) and the inquirer, and the interaction of the participant (teller) and the context of the story or situation. This underscores the understanding that the original teller is also reconstructing the story (p. 28). In summary, Blumenfeld-Jones (1995) states:

Fidelity as a set of emerging criteria for evaluating the quality of a piece of narrative inquiry has a twofold character. First, the inquiry should address a sense of “betweenness” acknowledging and making explicit the bond between the inquirer and the subject and between the story and the story’s context (with all the complexities the term “context” suggests). Second, there should be “believability” of the work in the story as both a reasonable portrayal of the specific story and as the story “resonates” with the audience’s experiences. In addition, the process of both decoding and recoding of the narrative must be included in the account. (p. 33)

So how can I attempt to achieve fidelity, both in terms of believability and betweenness?

I think that I have worked on this in a “triangular” fashion. This is very similar to the notion of triangulation that is traditionally discussed in qualitative research. I see the need to have the participants involved in a collaborative way with the collection of the remembrances of the story (the transcripts) and the reporting of the narrative. Emihovich (1995) writes about “narratives of collaboration” and “consensus of meaning” as necessary to develop the accuracy

\(^{26}\) Taken from the 1998 Canadian Oxford Dictionary.
of the narrative by seeing the story from other points of view. Connelly and Clandinin (1990) describe it as a "...mutually constructed story created out of the lives of both researcher and participant" (p. 12). This need for a "conversation" is considered a critical component of bringing out the perspective of the participant. Grumet (1991) uses terms such as "multiple texts" and "multiple interpretations" (p. 76). Donmoyer (1990, p. 188) indicates it is a "working with", not "acting on" the participants that is both necessary for the research to be trustworthy as well as ethical. All these writers suggest that collaborative work helps to ensure ethical research. I discuss this later in the chapter.

Lather (1986) calls for researchers to share the data collected with their participants. She refers to this "...submission of a preliminary description of the data to the scrutiny of the researched" (p. 260) as "catalytic validity" (p. 272). She believes that this reciprocity can be achieved by such methods as self-disclosure on the part of the interviewer during the interviews, sequential interviews in order to go deeper, and negotiation of meaning by sharing reporting (p. 266). I certainly agree with her and did accomplish some degree of reciprocity with the teachers. I conducted a set of three interviews over two years and shared in their conversations, including a copy of the transcripts, and a draft of the story.

This sharing of perspectives was not an unusual situation at Jubilee School, as the project actually began as an ongoing school-base collaborative project. Conversation and sharing of meaning were already a critical part of the process. Carson (1997) sees "the teacher as researcher" and Cole (1989) sees the teacher and researcher as "vital partners". McTaggart (1997) states the triangulation of observations and interpretations can be achieved by "participant confirmation". G. L. Anderson (1989) identifies this type of triangulation as "member checking" and the subsequent collaboration as "front-endedness" in research, but it still raises some issues (p. 253). Adelman (1997) summarizes, "the problem of participation is, in the main, who is to define the issue for their investigation, theorizing, and relationships, and in whose name is the research publicized, if at all?" (p. 100). As this action research started before the "official" research, the teachers involved gave me permission to conduct an inquiry. In fact, as the project unfolded, there was an expressed wish by the teachers involved that I record for posterity the results of their experiences in team teaching a large group classroom. I made a promise to do so and although I have taken responsibility to write the narrative, and will be using it to complete my doctoral program, I will share a copy of it with them upon completion.
One final note on the collaborative development of the story as a form of triangulation and its relation to truth claims. Emihovich (1995) states in narrative analysis we must remember “to tell stories or create narratives where the purpose is not to relate the truth but to come to a sense of shared understanding as to what is known” (p. 38). Lakomski (1992) expresses the same sentiment: “knowledge of reality is a matter not of the correspondence theory of truth but of the coherence theory of evidence” (p. 201). This evidence, the story, “the space of human understanding” is possible only as Smits (1997) states, “...within the lived world of practice and human relationships” (p. 293). Grumet (1991) states that by using “multiple texts” and “multiple interpreters” we can bring personal knowledge out “...into a community of people who share a world”(p. 76). I interviewed twelve teachers, seven parents, eight students and three central office personnel; collected documentation from numerous sources; shared transcripts and drafts of the narrative; and brought it out to public scrutiny in the form of a thesis.

**Space for the reader.** In all research, the interpretation of the findings is partially dependent on the readers. Olson (1990) states that “all reading involves interpretation” (p. 108) and Barone (1990) asserts, “the reader is obliged to speak. Lest he [sic] become enraptured in a ‘close reading’ unable to move beyond the private universe of textual reading, the reader must cast a suspicious eye on all texts” (p. 321). Barone (1995) describes the process of reporting a research project as interactional, “...a process of construction (by the writer) and of deconstruction and reconstruction (by the reader)” (p. 64). “She or he must trust her or his readers, grant them interpretive space, even as she and he artfully persuades them to reflect critically upon and reconstruct the selves of particular characters” (p. 69). This “interpretive space” Barone describes is “...an invitation to begin a new phase in the conversation” between the characters, participants, writer and reader (p. 72). In fact Helle (1991) indicates that “dialogue can be said to be one of the effects of narrative”; “narrative implies a dialogue in which the paradoxes of change and meaning function interdependently” (p. 57). van Manen (1997) also indicates that human science expressed in narrative form invites dialogue. He indicates the intention of an ethnographer “…is not to tell readers what to think of an experience but to show them the experience from beginning to end and thus draw them immediately into the story to work out its problems and puzzles as they unfold” (as cited in Wolcott, 1990, p. 143). Couture (1997) indicates “the point of stories for the action researcher is not to tell the truth but to open the possibility for what others might have to say to us” (p. 116).
So this begs the question, "How can I, in this narrative, develop an interpretive space in order to encourage the reader to dialogue?" I believe that providing fidelity, which I discussed previously, will help. I believe I need to provide a "oriented, strong, rich and deep" text; as van Manen (1997) suggests. The unveiling of the text needs to be contextualized, as Goodson (1995) describes. I need to provide the most accurate storied narrative that I can achieve. This will provide background (context) for the readers, a text (ured) space, and opportunity to imagine other possibilities. Jackson (1990) also provides a hint: "perhaps the idea of looking for something is what is wrong. Perhaps we have become so intent in looking for that we no longer know how to look at. Perhaps looking for encourages us to look past things rather than at them. Looking for constricts awareness, looking at expands it" [author's italics](p. 163). I need to provide a narrative of quality so readers have the opportunity to "look at" it.

Narratives invite the reader to understand that the writer is not providing "the truth". Polkinghorne (1988) states that narrative "...does not produce certainty; it produces likelihood" (p. 175) and Lakomski (1992) suggests that narratives can only provide "evidence". Bloom and Munro (1995) see the process of writing and reading narratives as one "...that should generate, rather than answer, questions..." (p. 110). This certainly is in line with the notion of inviting conversation and dialogue that we have just discussed. It again places responsibility on the reader. However, the reader must trust that the writer has dealt with the subjective/objective nature of writing and "the situatedness of subjectivity should never be veiled, discounted, or reduced" (p. 110). Thus, as writer, I have an obligation to deal with my bias (subjectivity/objectivity) in the writing of the text.

**Establishing the Writer's Persona – Subjectivity / Objectivity Dance**

The issue of the researcher's subjectivity affecting the objectivity of the research is certainly one that can dominate a discussion of researchers. In the many discussions I have had where I describe my research, the first statement out of the mouths of some colleagues is "How will you deal with the fact that you are the principal of the school and the researcher at the same time?" My research observations and reporting are suspect. Part of this concern is the belief that there is in fact an objective view.

Popkewitz (1984) discusses the movement in the human sciences toward adopting the "scientific" view of objectivity and its effects on what and how we conduct research. He lists the
results as follows: "...commitment to rigorous techniques as overshadowing theoretical interests by focusing on those aspects of research which can be numerically expressed", and using a technique that is superimposed over theory which "...simplifies the situation in a manner that hinders the search for understanding". Objectivity is narrowly defined, and "...the stress on procedures of science leads many to consider only those questions and problems that conform to its procedures rather than to having methods and procedures respond to and develop from theoretical interests" (p. 21). Eisner (1992) agrees and states "...the aim of the research enterprise, from a methodological perspective, is to use a procedurally objective set of methods in order to gain an ontological objective understanding of the events and objects we study". This "lead[s] to certain practical problems in the conduct of empirical research (we often tend, for example, to avoid studying what we cannot measure), but also because they reinforce a view of knowledge that is itself problematic" (p. 11). "The idea of 'eliminating personal bias' is a misguided illusion whose effect is to guarantee the irrelevance of the research. If an investigation requires the elimination of 'bias', let a computer record the results" (Hunt, 1992, p. 116). I wish my research to be about something that matters, something relevant. I don't want to be restricted to the scientific notion of objectivity. However, I also believe that I must deal with the objectivity / subjectivity issue.

I believe theory and practice are the opposite sides of the same coin. "Unless theories come from practice, they will not apply to practice" (Hunt, 1987, p. 109). Clandinin (1985) adds, "...theory and practice are viewed as inseparable; practice is seen as theory in action" (p. 364). She states, "teacher's special knowledge is composed of both kinds of knowledge, blended by the personal background and characteristics of the teacher and expressed by her in particular situations"(p. 361). Both researchers and participants have backgrounds and biases. This should in no way invalidate or impede research. What we do and our view of the world are influenced by our biases. Peshkin (1988) maintains "...that subjectivity operates during the entire research process"(p. 17).

Many authors have observed that the idea that a researcher, or anyone for that matter, can be objective is an illusion. Barone (1995) writes, "an author may no longer claim to provide

27 A method that eliminates or aspires to eliminate the scope for personal judgment (Eisner, 1992, p. 10).
28 We see things the way they are. We see them in a way that reveals their actual features (Eisner, 1992, p.10).
universal truth as a morally or politically neutral transaction of reality” (Barone, p. 65).

Polkinghorne (1995) adds that researchers need to recognize the role they had “in constructing the presented life story and the effect the researcher's views might have had in shaping the finding” (p. 19). Eisner (1992) suggests that “recognizing and accepting the inevitable transaction between self and world seems to [him] more realistic and more useful” (p. 15). In fact, the duality of being subjective /objective, and belief that one can be one or the other is a myth. Connelly and Clandinin (1988) suggest that they are found together and “our narratives and our knowledge are intersubjective” (p. 31).

‘Bias’, which is the meaning you make of the world informed by your accumulated experiences, is not incidental, nor something to be eliminated or simply accounted for. It is an essential aspect of research. It is bias and personal preference and background that provide the impetus and enthusiasm for conducting research. Peshkin (1988) uses the term subjectivity, which seems to be used synonymously with bias and background, and akin to being “virtuous” (p. 18). Bias and background are the starting points from which research into practice can lead to understanding (theory).

For qualitative researchers, subjectivity is a strength of this methodology, certainly in the narrative domain. Roman and Apple (1990) indicate that “subjectivity is not something to be purged from the research community. It is, rather, something to be acknowledged, understood, and learned from in the process of constructing the relations and representations of cultural selves and others. Its significance lies in the recognition of the joint construction of meaning in all social and scientific inquiry” (p. 38). The researcher brings a number of important characteristics to the research. Montgomery-Whicher (1997) writes, “the subjective view from which we necessarily research and write is also a strength. It is our subjectivity which breathes life into our descriptions and interpretations” (p. 220). Polkinghorne (1995) suggests that researchers need to bring their “special knowledge” as practitioners into their research, and Eisner (1991), and Miles and Huberman (1990) suggest that “connoisseurship” is a characteristic that helps the researcher become more effective. Lincoln and Guba (1985) relate this quality to qualitative interviews:

We recognize and affirm the role of the instrument, the human interviewer. Rather than decrying the fact that the instrument used to gather the data affects this process, we say the human interviewer can be a marvelously smart, adaptable, flexible instrument who can respond to situations with skill, tact, and understanding (cited in Seidman, 1991, p.16).
Thus, if biases are part of our human make-up and influence the observations and reports of researchers, we can’t separate the objective and subjective stance. And if our subjectivity is a strength in research, how can a researcher deal with the need to tell the “truth”, yet include a personal touch? Heshusius (1994) cautions, “the belief that we can and must restrain and manage subjectivity seems to me another misguided attempt at healing that split while in fact maintaining it” (p. 19). I agree and believe that I cannot manage my subjectivity, but may accomplish a balance between “truth” or accuracy and “connoisseurship” with the help of collaboration between the researcher and the participants, by being vigilant in the process of inquiry, and by ensuring that my multiple “I’s” are identified during the whole research process.

First, collaboration between the participants and the researcher, as described in the previous section on establishing fidelity, will go far in balancing the researcher’s subjective view with the objects of the narrative, the participants. As G. L. Anderson (1989, p. 262) suggests, we need to get back to the “trenches” of educational practice, the classroom, as I did in my research. The collaborative process needs to include writing “collaborative stories” (Connelly and Clandinin, 1990, p. 12) and “the submission of a preliminary description of the data to the scrutiny of the researched”, as suggested by Lather (1986, p. 260). Wolcott (1990) suggests “talk little, listen a lot” and “be candid” with your researcher partners (p. 127-131). Emihovich (1995) believes overcoming this dilemma of truth-value and authenticity lies in “collaborating with others to build consensus around shared meaning and to ensure the inclusion of multiple voices” (p. 37). I have attempted to do both as I have shared the interview transcripts with all participants and asked and received feedback. As well, I have shared a draft, my account of the story of Jubilee, with the teachers and have used the multiple voices of those involved including teachers, students, parents and myself as researcher to tell the story. This process will help balance “my” truth.

Second, I needed to monitor my “subjective gaze” throughout the process of the inquiry, which included the gathering of data, analysis, and reporting. This vigilant critique is a continuous process of looking at my effect on the inquiry. Hanson (1986)) suggests we understand “self-knowledge as an activity rather than an entity” (as cited in Witherall, 1991, p. 89). G. L. Anderson (1989) calls it “critical reflectivity” and describes these self-reflective processes as the ways in which researchers “keep their critical framework from becoming the container into which the data is poured” (p. 254). Lather (1986) calls the requirement of the
researcher to develop “a self-critical attitude toward how one’s own preconceptions affect the research” as “construct validity” (p. 270-271).

I developed my own sense of “disciplined subjectivity” in three ways. I, as Hunt (1987) suggests, “ran myself through” the research. I explored my beliefs and theories about education and disclosed them in Chapter One. This was also part of developing the research proposal. I also was interviewed to rehearse the research questions. Then, I monitored my thoughts and feelings through the use of a journal. This helped me confront myself throughout the whole research process. Finally, I sought feedback as suggested by Wolcott (1990, p. 132) from colleagues and participants. This feedback was in the form of articles written with participant input, (see Babiuk, 1996 and Babiuk (in press)). I also was involved with a support group at OISE that discussed research issues and challenges. Finally, I have a colleague with whom I shared and discussed concerns throughout the process.

The third way that I dealt with the subjective / objective dance was to be up front with who I was in the reporting of the research. Peshkin (1988) suggests that “one’s subjectivity is like a garment that cannot be removed” (p. 17). Luce-Kapler (1997) suggests that “perhaps it is time to reveal the writer of the research as much as the data. The writer is the data; the data is the writer” (p. 187) and “maybe research is always for ourselves, no matter what we say” (p. 188). This revelation of self in the methodology of one’s research is called “reflectivity” (Ruby 1980, cited in Roman and Apple, 1990, p. 67). Hunt (1987) argues that the “first person singular” is necessary for inside – outside research (p. 106). Ivanic and Simpson (1992) state that by not using the first person singular, researchers “…are not cutting themselves out of their writing; instead, they are creating an image of themselves as people who have an objective view of knowledge”. These authors believe that “taking responsibility for your ideas commits you to truthfulness” (p. 144). I certainly believe this and do present my research in the first person singular. However, as I am not only the researcher, but also a participant, I have at least two voices.

I have approached this dilemma by using what Connelly and Clandinin (1990) call “multi ‘I’s” or being “plurivocal”. This technique helps “…sort out whose voice is the dominant one when we write ‘I’ (p. 9). “One of our tasks in writing narrative accounts is to convey a sense of the complexity of all the ‘I’s’, all of the ways each of us have of knowing” (p. 10). Peshkin (1988) also uses a similar technique he calls a “subjectivity audit”, in which he considers all of
his positive and negative feelings, “warm and cold spots,” as voices in this subjectivity. He provides them space to come forward to voice their ideas throughout the research process. He calls it “taming subjectivity” (p. 20). My attempt to provide space for my “I’s” is to develop a dialogue in the actual text. In other words, the narrative reads like a script, with opportunities for all of the participants including myself (as researcher, participant, principal, and advocate) to have a voice. Thus I have addressed the difficulty that Connelly and Clandinin (1990) warn about, namely, the tendency to confuse the researcher’s “I’s” and not provide space for other voices. I believe, as McGuire (1990) suggests, in my multi-vocal account I allowed for “the tale’s reflection on the teller” (p. 233), I have taken responsibility for the narrative. This is how I have attempted to provide for what Lather (1986) calls “the tension between advocacy and scholarship” (p. 272).

In the end, I attempted, as Barone (1990) encourages, “...to lift the veils of objectivity”, show “...the face of an author making choices about method, language, plot”, and provide the reader with “...evidence of visions of educational significance that have inspired and guided the fashioning process” in the hope the readers will “...hear the personal voice that research conventions may have tended to muffle”. Those muffled questions might be “What is the author’s story?” “Who are the characters?” “What is the nature of their plight?” “How is the central dilemma (as our dilemma) to be resolved?” (p. 320).

I also believe Hunt (1992) provides another process to help unravel the objectivity / subjectivity tangle. He suggests that we need to get in touch with ourselves by “bringing out” our attitudes, implicit theories, and images of research. This “bringing out” process is ongoing. It begins the research journey and guides it to its conclusion. Peshkin (1988) describes a similar belief: “I would actively seek out my subjectivity. I did not want to happen upon it accidentally as I was writing the data. I wanted to be aware of it in process, mindful of its enabling and disabling potential while the data were still coming in, not after the fact” (p. 18). Personal background and biases (subjectivity) cannot be ignored but must not only be ‘brought out’ reflectively by the researcher, during the design, implementation\textsuperscript{29} and interpretation of the findings, but also be rendered explicit in the reporting of the research. In this chapter and in

\textsuperscript{29} A researcher may design a qualitative study, but that does not necessarily result in its exact implementation. Unexpected and unplanned events require the researcher to be flexible. In fact, this flexibility or “openness to surprise” is a hallmark of qualitative study (Hunt, 1987).
Chapter One I have outlined the possible implications of my background and bias on each research stage: design, implementation, interpretation, and reporting. This is my attempt to dance with my subjectivity and objectivity, my attempt to bring my biases “up front”.

**Generalizability – Can one size fit all?**

The concept of generalization in qualitative research is another of those concepts that has been borrowed from science. It has been discussed under terms such as external validity, transferability, comparability, usefulness, and apparency. Not only is there a multitude of terms to describe generalization, their meanings are also varied. Merriam (1988, p. 175-177) outlines four kinds of generalization. First, she discusses a kind of “working hypothesis” that provides a perspective that is context bound (from the work of Cronbach, 1975). Second, she describes “concrete universals” where the general is found in the particular (from the work of Erickson, 1986). Third, Merriam discusses “naturalistic generalization” that is based on tacit knowledge, intuition and personal experience (from the work of Stake, 1978). Finally, she examines “reader or user generalizability” that puts the onus on the reader to make connections (from the work of Wilson, 1979). Kidder (1982) adds another concept called “face validity” which “…provides a click of recognition”, and a ‘yes of course’ instead of ‘yes but’ experience” (cited in Lather, 1986, p. 271). These views recognize that the reader is partially responsible for determining generalizability.

Schofield (1990) uses the term “fittingness”, from the work of Guba and Lincoln (1982). It is best thought of as “…a matter of ‘fit’ between the situation studied and others to which one might be interested in applying the concept and conclusions of that study” (p. 226). Again, the idea is that readers need to decide on the applicability of research to them. The role of the author is to have “…an openness to having one’s expectations about the phenomena disconfirmed” (p. 227). She also outlines three targets for generalizability: “studying what is” the typical, ordinary, common; “studying what may be”, the leading edge of change, the lifecycle of a process; and “studying what could be”, something that we know or expect to be ideal or exceptional (p. 209-221). I see aspects of all three targets in this study. I have adopted the term “fittingness” for my study as it best corresponds to my idea of how narrative analysis can be generalized. I believe that the reader is the key in this process and, as researcher, I need to do my best to capture the essence of the findings so the reader can have a “yes of course” moment. There are potential
issues that must be addressed in order to provide a narrative that can allow for its readers to see any "fittingness" to their experiences.

Connelly and Clandinin (1990) indicate "...one of the most frequent criticisms of narrative [is] namely, that narrative unduly stresses the individual over the social context" (p. 2). Smulyan recommends a balance between the individual and social context, "balancing the story of the individual in all of its uniqueness with the larger social, political, economic contexts which frame it and are, in turn, reinforced or challenged by the individual's actions and responses" (as cited in Hatch and Wisniewski, 1995, p. 120). Goodson (1995) agrees and sees the telling of life stories as a political act that needs to include the context of the story (p. 97). Connelly and Clandinin (1990) warn about "broadening" or generalizing instead of remaining in the description of the individual and the context (p. 11). Hatch and Wisniewski (1995) indicate we need to artfully weave the "...unique experiences of the individual and the constraints of broad social, political, and economic structures" so that life stories "...are barely visible, but their presence is essential" (p. 128).

The difficulty of including descriptions of the context of the story and the individual(s) or character(s) is that their uniqueness limits the ability to "fit". As Carter (1993) indicates, "the work on story makes the issue of generalizing especially problematic" because narrative knowing is not the same as paradigmatic knowing and "...the relationship between story and reality is, at best, troublesome" (p. 10). van Manen (1997) calls this the "theory of the unique" (p. 150) and Grumet (1990b) calls for a balance between the individual perspective and a societal one.

Donmoyer (1990) indicates that generalization from research findings tends to be "tentative", "suggests possibilities but never dictates action", "conceals even as it reveals", and has moved from the role of "answer giver[s] to question framer[s]" (p. 182-183). He sees the advantages to single case studies for readers of research as: allowing "accessibility" to situations that would not be possible without the report; giving the reader a chance to see the situation or case through "researcher's eyes", providing another point of view; and finally decreasing defensiveness and "resistance to learning" (p. 192-197). Carter (1993) suggests we can overcome some of the problematic issues surrounding generalizability by "...careful framing of patterns with respect to certain themes" to allow for "explanatory propositions" which are "...subject to reformation in the face of new stories" (p.10). Polkinghorne (1995) states "...the cumulative effect of narrative reasoning is a collection of individual cases in which thought moves from case
to case instead of from case to generalization” (p. 11). Storied accounts must “appeal to the reader’s experience” and “…be compatible with the reader’s background knowledge or beliefs in characteristic behavior of people or nature in order for the reader to accept the explanation as possible” (p. 19).

Narratives are not primarily written with generalizability (at least in the scientific research sense) as the goal and it certainly is not my main purpose. However, I do hope that the research reported in this thesis, a narrative analysis of Jubilee School’s eight years of team teaching in the large group format, will be of use to other educators. I hope it provides that “Oh yes, of course” response and a space for the reader to consider possibilities. I assist in the probability of these reactions occurring by providing fidelity to my reporting and using the triangulation of voices. Also, I have provided historical frameworks (Chapter Two) and an outline of my methodology (this chapter) in order to provide a foundation for readers to decide on the “fittingness” of this research to their experiences. But, as Shulman (1988) reminds us, “…the reader must judge whether the findings we report for the individuals whom we have studied should be considered applicable to any other group of individuals regarding whom our reader might be interested” (p. 10).

There is one other consideration that effects the quality of any research and that is the ethical treatment afforded to the participants, because in the end, if they are not cared for and respected, what can we make of the researcher and the findings?

Ethical Considerations

Any research, either qualitative or quantitative, has the potential to harm the participants in the inquiry. As Popkewitz (1984) states, “questions of morality and immorality are always involved in social research since the ‘subjects’ of social scientists are people” (p.19). There is the possibility that participants can be manipulated for the benefit of the researcher. There are the possible lingering effects on the participants, such as feelings of discomfort, anxiety, false hope, guilt, self-doubt, anger, disgust, etc. (van Manen, 1997, p.162-163). Questions are raised such as, “Who will benefit from the research? Whose knowledge gets articulated?” (Roman and Apple, 1990, p. 55). In addition, there is the possibility of positive transformation such as heightened perceptiveness, increased thoughtfulness and deeper understanding. However, I believe that the main concern of a researcher is to protect the participants. The ethical concerns I have identified
fall into three categories: protection of the participants’ privacy; the need to honour the voices of those being researched; and the need to promote reciprocity

**Protection of privacy.** Measor and Sikes (1992) sum up this situation;

There is no doubt that participants are vulnerable when they agree to enter into relationships with life history or narrative researchers. The moral dimension of these inherently close relationships requires researchers to fulfill certain obligations to their informants. On the most basic level, “researchers have an obligation to protect people from being managed and manipulated in the interest of research”. (cited in Hatch and Wisniewski, 1995, p. 128)

As researchers we need to ensure that the participant’s privacy is protected and L. M. Smith (1990) believes that informed consent and anonymity are the most important principles for their protection (p. 260).

In this research, I am bound by both the ethical conduct expected of the teaching professional and the research community, in this case OISE / UT. I provided my colleagues and participants, using a consent letter (Appendix I), with an explanation of what and how the information they were providing would be used and reported. Because I offered them a choice of what form their involvement in the project would take, participants were involved willingly and had the opportunity to withdraw from all or any portion of the research at any time without adverse consequences. Permission to tape-record was always asked of the participants before each interview and all material collected has been treated confidentially. The participants’ identities were kept anonymous with the use of pseudonyms. Finally, tapes, transcripts, and other documents will be stored in a secure location until final disposal one year after the final oral. As Merriam (1988) states, “the best that an individual researcher can do is to be conscious of the ethical issues that pervade the research process, from conceptualizing the problem to disseminating the findings” (p. 184).

Soltis (1990) indicates we are not dealing with “subjects” but real people and must “...treat persons as ends in themselves and not as means to our ends” (p. 252). We must also be cautious not to show participants in a negative light because we had them answer questions, of our choosing, in an interview which can “make them look ignorant” (Nespor and Barber, 1995, p. 56-57). We must balance the use of the personal vernacular of the participant with protecting how they will be perceived in our recounting of their story. I have attempted to protect the participants from “looking bad” by providing opportunities for them to edit their transcripts and draft copies of Chapters Four and Five. Y.S. Lincoln (1990) suggests that we shift the focus of
the inquiry from the researcher to the participant(s) (p. 290). We can accomplish this by ensuring that their voices are recognized.

**Voice.** Bellack (1978) argues that for a synthesis between researcher and participant voice, “each view of research provides a different but essential dimension to the study of human events; no one view is adequate” (cited in Popkewitz, 1984, p. 55). Hatch and Wisniewski (1995) call this “the crisis of representation” and suggest that inquirers take “…special care in establishing relationships with their subjects, in constructing their texts, and in framing the presentations of their texts for readers” (p. 121). Stories need to be co-interpreted and co-authored with participants and, “researchers need to acknowledge and monitor their participation in the construction of the storied lives of their informants” (p. 130). Emihovich (1995) summarizes, “the key for transformation through narrative lies in collaboration, of constantly testing our meaning against that of others, building consensus around shared meaning, and ensuring that as many voices as possible are included” (p. 45).

In this research project, I attempted to bring the teachers’ voices to the centre of the text by including them directly in the dialogue. Not only did the dialogue and conversations occur over eight years but, during the “official” research I used three rounds of interviews to help me hear their voices and enable them to hear mine. In the final writing I have also given them the opportunity to monitor their voice by sharing the draft thesis with them (Chapter 4 and 5). I also provide a space for their voice as I work at providing mutual benefit, or “reciprocity”.

**Reciprocity.** There is always the danger that the researcher will become a “voyeur” or an “intellectual tourist” while working with participants in the field (Roman and Apple, 1990, p. 69). Researchers must guard against “commando raid” type research projects, where the researcher runs in, gathers data, and runs out to write and report and benefit from this activity, leaving the participants behind to fend for themselves, none the wiser (Connelly and Clandinin, 1990, p. 12). Reinhartz (1979) calls this the “rape model of research” where the goal is “career advancement of researchers built on their use of alienating and exploitative inquiry methods” (cited in Lather, 1986, p. 261). Lather advocates “…that we consciously use our research to help participants understand and change their situations” (p. 263). Marshall and Rossman (1995) have more practical though no less important suggestions about giving back to the participants. They

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30 Y. S. Lincoln (1990) describes it as research “where the inquirers took what they wanted, leaving respondents defenseless, vulnerable, and perhaps wounded” (p. 293).
caution, "the researcher is indebted and should be sensitive to this. Reciprocity may entail giving time to help out, providing informal feedback, making coffee, being a good listener, or tutoring" (p. 71). I see these small acts as very practical and an essential part of being a collaborative participant.

For me the importance of providing some form of reciprocity for the teachers was paramount, as I was a member of the teaching staff. If I have learned one thing in my twenty some years in junior high schools it is that helping and supporting each other is one good way to develop a working reality that not only allows people to survive but to thrive. So as I moved into the "official" research, my relationship with the participants continued to be one of mutual caring and benefit. We had made the changes at Jubilee School to improve our working reality and develop a more caring and committed relationship with our students. The action research process, which included the interviews, observations, discussions, and final reporting were all part of our collaborative efforts to bring about our vision. It was a mutually beneficial project.

On the practical side, I understood that the interviewing that I was doing with the teachers and their subsequent reading of transcripts was "biting" into their precious time. My small token of appreciation to them before I left was to provide a social activity, a BBQ with all the fixings and refreshments and an opportunity to relax in a hot tub that I rented. This will never compensate for the time they gave to me to tell the stories of their classroom experience and what I received as data for a thesis. However, I believe, and they have stated, that I took on the responsibility to report their journey into team-taught large group instruction and, thus, provided an account of a significant attempt to change schools. This thesis marks the completion of that reporting obligation and each participant will receive a copy.

**Conclusion.** Ethical treatment of participants is paramount to conducting research, because as both a "subject" of research and a "producer" of research I have felt the effects of it from both positions. Zeller (1995) suggests that "mutual shaping" of the narrative accounts and seeking many different reactions from multiple voices will go a long way to safeguard the respondents and help me as a researcher to reduce the egocentrism of my reporting (p. 87). Soltis (1990) lists the non-negotiable professional ethical values as "...honesty, fairness, respect for persons, and beneficence" and the ethical professional standards as "...privacy, avoidance of deception, confidentiality, contractual obligations, and informed consent" (p.256). L. M. Smith (1990) outlines "some concrete principles" that he calls, "common sense" considerations for
ethical behavior of a researcher. He uses the term “secular humanism” or “democratic liberalism” based on a belief in equality, justice and caring, and a commitment to try to live by them (p. 272-275). Noddings’ approach to the ethical self is “rooted in receptivity, relatedness, and responsiveness” (cited in Witherell and Noddings, 1991, p. 90). Hunt (1997) includes the spirit of mutual benefit and understanding, reciprocal caring, and commitment. Y. S. Lincoln (1990) reduces the idea of ethical conduct in research to one guideline, “the categorical imperative is often deemed the ‘golden rule’ of philosophical systems, since its sense is very like the dictum to do unto others as one would have them do unto oneself” (p. 291). All of these have been my imperatives and what I have lived by as a teacher, administrator and now researcher.

This chapter has outlined how I came to choose a methodology of research and how I have engaged in that method. It has described how I collected and organized the data, interpreted, analyzed and reported it using a narrative analysis to tell the Jubilee Story, the focus of the case study. The chapter has concluded with the challenges to scholarship and the steps I took to achieve it. The next chapter is the beginning of the narrative analysis, the story of the Jubilee project.
Chapter 4 – The Jubilee Story

Prologue – Introduction

The following chapter is a narrative analysis of an episode at Jubilee Junior High School that involved the staff making holistic-type changes to its structure and organization. It cannot be a complete account, from beginning to end for, like conversations, most stories begin in the middle with a past and a future that may not always be part of the telling. I use the journey metaphor found in Drake (p. 7, 1993), as an organizing archetype and displayed in Appendix N. The journey model will provide a temporal order and a structure for the analysis of the data. I also mirror the journey model with the life cycle of a plant31 which, like the journey model, is cyclical and provides a visual image to enhance the telling. The story structure is needed because the information, gathered in the interviews and the documents that I collected, is not connected as part of an integrated story. By organizing my thoughts as both participant and researcher, along with those of the teachers, students, parents and other community members, around the metaphor of the journey model I create a story, a history, and analyze it in narrative fashion. Our lives do not organize themselves into a story; it is the writer, or storyteller, who does that. We do not live a “storied life”, rather, we live from moment to moment. Weaving these moments together creates the story, a narrative analysis. The purpose is meaning-making through narrative knowing.

Although I am creating the story of Jubilee by organizing the data this way, I do keep to the incidents as I and others remember them using the interview transcripts, my personal journal, newspaper articles, letters, and other documents as reference. They are not fictitious events, but I certainly have chosen, ordered, and interpreted them. I integrate the accounts of teachers, students, and parents to help expand my account and bring their voice into the dialogue. I use a dialogic format to distinguish each participant’s voice. Thus, during the telling, a conversation of types, a multitude of voices and story threads are woven together on the journey metaphor frame.

31 The metaphor I used to describe the process of the Jubilee project in my interview.
The Story

Preface

The story you are about to read has been written using reference from the interview transcripts, collected documents, and personal journals. It has been shorten from the original story that I wrote in an earlier draft of this thesis as it was considered "over long". However instead of completely eliminating the story, I have included this shortened version to provide context for the next chapter which outlines the teachers, students, and parents perceptions of their experiences as a large group classroom for three years. The story will assist readers in comprehending how the participants came to express their perceptions of the long-term relationships discussed in Chapter Five.

Characters / Voices

Researcher and Narrator       Author of this Thesis, Gary Babiuk
Gary                           Principal of Jubilee and participant in the story
New Characters                 All will be introduced by the narrator during the telling.

Note: The real names of the characters will be used during the telling of the story as all of the statements are from public documents and previously published articles where participants gave permission to use their names.

Background / Scene

Narrator: The structures of public schools in Europe and North America have from their inception been modeled after factory work during the early Industrial Revolution. The very nature of their organization, testing and accountability has been business oriented. Over the past hundred years a number of progressive and humanistic movements have tried to change this metaphor for schools but in the 1990’s schools still reflect a fragmented, assembly-line mentality.

The belief that there needed to be a separate school for young teenagers, too old for elementary and too young for high school led to the development of Junior High Schools during the first half of this century. In the past 20 years the middle school movement has tried to temper the high school structure of junior highs to a more flexible and nurturing ethos.
In Alberta, the province in which the story happened, the same is true. The majority of young teenagers attend separate junior high schools. The middle school movement is a relative newcomer to the Alberta scene. Jubilee Junior High School is no exception. It was instituted in the early 1960's as a place for 12 to 15 year old students to become high school students; it came to be a "junior" High School. The organization and structure were the same as that in a traditional high school. Each student took six core courses (Math, Science, Language Arts, Social Studies, Physical Education and Health) and a number of optional or complementary courses (Art, Home Economics, Industrial Arts, Band, Computers, Drama, Outdoor Education and French). The day was divided into six or more periods, with students moving to a different classroom at the sound of the bell. In an average day each student would meet from four to six teachers. Exams and report cards imitated the high school format as it was believed they prepared students for the more important stage of their education - high school with its credits, diploma exams and final preparation for the "real world" after school. As Moffett (1994) describes: "The specialization that begins within the self-contained classroom culminates in middle school or junior high with the traumatic fragmenting of education into separate classes with separate subjects, teachers, rooms, and hours, from which few students fully recover" (p.278).

To help set the stage for the Jubilee Story, I will let the report of a school evaluation of Jubilee Junior High School conducted by a team of seventeen outside educators during the week of January 16-20, 1989 provide a general perspective prior to the principalship of Gary Babiuk. This evaluation included reviews of the Programs (Core and Complementary), Classroom Support Services, and School Operations / Management. Also included were summaries of the survey and interview results of parents, students, teachers, and support staff. On the whole the evaluation reported satisfactory Programs and Classroom Support Services. However, in the School Operations / Management they report some obvious concerns in the following areas (Yellowhead School Division, 1989).

**Evaluators:** Administrative Functions – The principal legitimately perceives himself as having final authority in the school. However, it has been carried to the point that he has taken direct responsibility for many functions in the school. So many, in fact, that the school is perceived by some to be "Mr. X's School" (p. 36).

Communications - Informal communications in the sense of collegial discourse between the principal and the staff appears to be lacking. More seems to take place between the staff and
the assistant principal. Staff communication to administration overall could be described as tentative and below what would be expected for healthy staff relations and a smooth running school (p. 37).

**Staff Morale** – Staff morale does not appear to be very high. There appears to be some staff-staff conflicts and certainly staff-administration problems. Staff-administration difficulties seem to emanate from a perception that there is a lack of trust in staff on the part of the administration. This results in a lack of trust in the administration (p. 37).

**Narrator**: All of the above indicated that there were some difficulties between the principal and the staff at Jubilee School. What was your impression of the situation?

**Gary**: This certainly was the atmosphere at Jubilee School when I arrived in 1990. It basically was unchanged in organization and structure since it began in 1961. There was a principal and a vice-principal. A few rooms had been added in the early years, but not much had been changed to either the organization of the school day or the organization of the staff or the structure of the building. In fact many of the parents remembered the same color of the paint on the walls as when they themselves attended Jubilee.

The values inherent in this system were orderliness, worker efficiency and compliance to rules and regulations. Students were expected to follow the requests of the teachers and administration. Rules were developed and the list became longer as more wrongdoings had to be addressed. A Students’ Rights Charter had been developed but students saw the focus on “rights” as the only important aspect of this document. The corresponding responsibilities were often neglected, as the students believed they had the right to do what they wished. Any teacher who had a student not complying with their requests, no matter how trivial, sent the offender to the office to be dealt with by the “administration”. Although there was a student handbook outlining the expectations for student behavior, teachers expressed in the school evaluation, “...concern that these guidelines are not equally enforced” and “...indicated that they did not receive strong support with discipline problems” from administration (Evaluation, p. 61).

Most teachers saw their job as filling the students with the knowledge and skills of their chosen discipline as outlined in the provincial curriculum in preparation for high school. Any integrating of the subjects would occur through the odd project developed by a few core teachers. The turnover of staff had been about 33% a year over the three or four years before my appointment as principal.
Narrator: What about the students and community?

Gary: The student body is drawn from a community population of about 8000. There were seven elementary “feeder” schools and, thus, in their first junior high year many students were unfamiliar with each other and the school building. Many of them, too, were beginning the tumultuous time of their lives known as adolescence. This time is often highlighted by changes to their physical bodies, especially the increase of hormones, a desire for freedom, and rebellion against authority. Accommodate over 500 of these students in one building and you have an exciting time, to say the least. Most of the student body dealt with this situation in a fairly typical way. However, there was a group of adolescents, approximately 8 - 10%, who were non-attendees, defiant, belligerent and at risk of leaving school. Most parents of these students were unable to deal effectively with their situation.

The community, through the development of stories and myths, had created a public image of Jubilee as an unsafe place rampant with violence and misbehavior. In the school evaluation report, parents expressed “...concern regarding their perception of vandalism, theft, drugs, and alcohol in the school” (Evaluation, p. 53). In fact, during the last week in August, prior to the start of my first year, I was shopping for groceries. When the grocery clerk recognized that I was new to the community he asked where I was working. When I said Jubilee, he warned me not to go there. It was a dangerous place with knife fights and drugs.

Narrator: Here are the comments from some parents that I interviewed.

“Jubilee has always been under the scrutiny of the community. I don’t know whether it’s because it’s got, four or five hundreds kids that are age thirteen to fifteen but it has always been under criticism. Out of any of the schools in the Yellowhead, this one gets it” (PEp. 5).

“Jubilee! It’s not Jubilee! It’s the age of the kids. It always has been and always will be. It’s a natural biological fact and that’s what the problem is” (PDp. 4).

Thus the stage is set for the Jubilee Story.

Scene One - Call to Adventure / Planting the seeds

Preamble.

Narrator: As Glen Thiel, a teacher and one of the co-originators of the large group project, stated, “this whole large group thing didn’t come from anywhere, it came from a thousand places. It was not born of one thing. It was born of a million ideas that all came
together to deal with certain kids in a certain situation at a certain time with certain expectations”. How did you see it start?

**Gary**: From my point of view as principal and newcomer to the community, I believe the Jubilee project germinated as the result of four favorable conditions or interactions that are interwoven and interconnected in numerous ways. First, I believe that as a new principal in a school I was looking for direction, and the collaborative way the first year unfolded provided fertile ground in which this idea could be cultivated. Second, growing conditions were favorable with the School Division’s Collaborative Staff Development Project (affectionately called BATPIG, an acronym for Butt and Townsend Professional Improvement Group) being offered and my happenstance of joining the Jubilee Team. Fertilizer and water were available to assist the growing of an idea in the form of a Secondary Principals’ Collaborative Discussion Group, led by John Martini, the Division’s Curriculum Director. Finally a seed of an idea was brought forward by two teachers, Val and Glen, as a result of trust developed out of the first two conditions.

**Narrator**: Here is an account of the beginning of a journey, the planting of a seed of an idea, (re)constructed from the documents collected.

**Fertile ground.**

**Gary**: I remember my first official day at the school. It was August 20th. I had been to the Central Office to talk with my supervisor, the Deputy Superintendent. I arrived at the school at about 11 o’clock. As I walked in the front door there were seven teachers all wanting to talk to me about their assignment and I didn’t know any of them. Within the first day, I also discovered the timetable, which was not complete, was different than what I was used to. My experience in timetabling was limited and I quickly found that there was no master board or computer program in which the timetable was located. The current work had been done on sheets and slips of paper. I immediately felt that I probably couldn’t do this on my own. I was pretty frustrated and was ready to quit. Not only did I not have a timetable, I had tenured teachers who were not happy with their assignments. Student option courses had not been assigned because there was no timetable of teachers for these options, and I was also having difficulties with Canadian Immigration over hiring a teacher to fill a .3 position that was necessary to fill the staff compliment. I was really down in the sense that I couldn’t see how, even if I worked 24 hours a day for the next two weeks, I could solve all these problems in time for school opening.
Narrator: So how does this situation provide fertile ground?

Gary: Well the next day, one of the teachers, Fred, who had been involved with doing the timetable up until that point, and another teacher, Glen, came in and took control of the timetable and we were able to complete it by the end of that week. There were two other teachers who came to my rescue. Andy, the vice-principal, and Val, another teacher and co-originator of the large group project, came forward in the first few days and took over the assigning of options. All this was beneficial to me, as I could leave Glen, Fred, Val, and Andy to work on their projects while I dealt with other concerns that were coming to my office for resolution.

One other factor led to the successful opening of the school. Fortunately, the school division had the secretaries in for the two weeks before school opened. That was critical, as they knew what had to be done, what forms, letters, and other tasks needed to be completed before the new school year began. This team effort allowed me to be available to meet parents and teachers. It also allowed me to attend the Division Workshop on Collaborative Professional Development, which was the next necessary condition. This collaborative effort allowed for a successful opening of school and the satisfaction of most teachers with their assignment. What I would say is that the staff really pulled together during those first two weeks to get things going. Being the newest staff member, I relied on the teachers and secretaries to provide me the support and advice I needed to make decisions. I think that helped them realize that I didn’t have all the answers and that we were working together. I trusted and appreciated their professional knowledge and experience and they shared in the decision making, although I was the one who was ultimately responsible. Being new, at both being a principal and at Jubilee, I realized that I needed help and I shared this need with the staff. Soon, many staff started taking ownership of what we were doing at Jubilee and realized it wasn’t just Gary Babiuk’s show; it was “our” show.

Favorable growing conditions.

Narrator: So what’s next?

Gary: Well, it so happens that a new attitude toward solving problems and working as a team, was the focus of a Divisional collaborative project (BATPIG) that was to kick off with a two day workshop in the last week of August. Three of the members of the Jubilee BATPIG team were Andy, Glen and Val. The theme of their project, which they had decided to pursue in June when they formed, was “team enhancement”. As we had accomplished so much at the
school in the first week, I felt I could take time to be a part of this initiative. It's funny I came across this project as I sorted through the paper work on my desk. The name, BATPIG, certainly did not inform me of its goals. Thus my joining was not as much an informed decision as an intuitive response, driven by panic or fear or both. It would prove to be the most important decision that I would make in my first year as principal, for the BATPIG workshop and the subsequent process we went through would be instrumental in the successful completion of my first year as principal and the beginning of our journey into the large group teaching project.

Narrator: What is BATPIG and how did it get started?

Gary: My understanding is that it started the summer before I arrived at Jubilee, 1989. But I'm not sure of the background, but I will let John, the main instigator, enlighten us as to its beginnings.

John: Sometimes things just fall into place. While on sabbatical leave a couple of years prior, I had the opportunity to work closely with a couple of professors from the University of Lethbridge – Dr. David Townsend and Dr. Richard Butt. I was aware of their interest in school-based staff development so I invited them to our school division and offered them an opportunity to speak, on three separate occasions, to every teacher in the division. Their message was an invitation to enroll in a school-based, ongoing and collaborative form of staff development. This invitation gave teachers not only the option of participation, but direct control over the content or the “what” of their professional development (Martini, 1994, p. 29).

Narrator: What was the process?

John: The total professional development project (see Townsend, Butt and Engel, 1991) involved several key elements. The initial three-day seminars were based on research by Richard Butt into understanding teacher development through teacher professional life histories (Butt and Raymond, 1989). Through a process of collaborative autobiography, each school team examined their working realities, their teaching and their development as a teacher. Out of this process they identified personal group agendas for professional development and devised school-based projects, which would meet these needs during the forthcoming school year (p. 31).

Narrator: How does this relate to the Jubilee project?

Gary: Well I would, along with a team from Jubilee, get involved in the next two years of the BATPIG initiative. The Jubilee Team was formed in June at the end of the first year, as they had not participated in that first year. I arrived at the in-service at Central Office and met
some of my teammates for the first time. I had worked with Andy, Glen, and Val the week before but Herb and Cate (teachers on staff) were unknowns. As well, I met a lot of people from other schools across the school division. These two days were very exciting as we did a number of team-building activities with other teams and also started the process of determining our own project. As the two days came to a close and I was feeling much better about being principal and working with my colleagues on the BATPIG team, we decided that we as a team needed to go through our life histories, like many of the participants had done the year before. We also decided that we would meet in the evenings at each other’s homes.

**Narrator:** Why was that?

**Gary:** Well, we had heard from some other teams that meeting at school tended to be hurried and sometimes interrupted in the hectic pace of the regular school day. As well, after school was usually a down time, with energy levels at a low point. We were all enthusiastic about this process (for the other members of the Jubilee team it was important to them to improve their working reality as they had had a few years of low morale at Jubilee). For me I knew, at some level, that this group of teachers could be the support and source of feedback that Andy and I would need in our administrative roles. So we felt it was necessary to give quality time to the process of going through each of our life histories.

**Narrator:** Maureen, an elementary teacher and of the original participants of the BATPIG project outlined the process in her Masters Thesis, 1993

**Maureen:** If teachers share their biographies with each other, they are more apt to develop trust and mutual respect for each other. With such trust, teachers are more likely to discuss “riskier things”, like failed attempts in teaching and general insecurities about their own teaching expertise (p. 57).

**Gary:** Yes, our experience did bear this out. We had agreed that each of us would host a meeting at our home and share out life histories using the outline that Richard and David had developed and we had completed before the workshop in August. The life history document was quite extensive. The idea was to give each member an evening to share his or her thoughts and for the rest of the team to give them our complete attention. Then the host would have snacks after and we would visit.

**Narrator:** Well, was it successful?
Gary: More than any of us could imagine. Herb, one of our counselors, was the first to volunteer. Well, he did such a heartfelt and intimate job of relating his life history to his professional life that we were all immediately drawn together. He also set the stage for each subsequent person to be as candid. The snacks that were provided were excellent and we had a lot of fun. Also in the informal discussions that occurred before and after the life histories, I was provided needed support and feedback about the happenings at the school and what I was experiencing as the principal. The life histories continued to be in-depth and many times very emotional, verging on therapy sessions. But we were able to maintain a professional atmosphere throughout. One other thing seemed to draw us together. We began this one-upmanship with the snacks. As we moved from home to home every two weeks over the next three months the snacks got more elaborate and I got heavier.

Narrator: Was that all that you were doing, life histories?

Gary: No, although I believe just doing them would have provided a valuable feeling of camaraderie that would have been beneficial in the long run. These home meetings resulted in us planning and carrying out classroom intervisitations as a complement to our life histories. We were also meeting with the other divisional teams every two months and Richard and David met with our team a number of times. Our project was the same as the one that the team had developed in the June before the school year started, “team enhancement”. Thus, as we shared our life histories and visited each other’s classroom (even though I was the principal, I taught a class as I was expected to teach); we came to realize the significance of this collaborative process. We then developed a plan to involve all of the staff, all 27 teachers and support staff. The planning did not happen in one meeting but developed in our minds as we were involved in larger discussions with other teams, and encouraged by David and Richard.

Narrator: So then what happened?

Gary: Well, we came up with the idea of using a January Professional Development Day as a Mini-BATPIG workshop. By December we had finished our life histories and visited each other classrooms, we set out to plan the day. We would do a shortened version of life histories and some team building activities. We also felt that we had to include all of the staff, so we invited the secretaries, classroom support staff and custodial staff. We collaboratively planned the activities and, of course, there was food. Then we held a wine and cheese after the day was over. We felt that it was a success.
Narrator: Again, how does this connect with the large group instruction?

Gary: The staff at Jubilee was composed of fifteen veteran teachers, ten newly hired mostly first year teachers, a new principal who was also a beginning principal, and a vice principal that had only been in the school a few months before me and also was a rookie administrator. These activities, as Maureen stated, helped bring about a reciprocal trust and respect between the administration and staff. It modeled the BATPIG team’s and my belief in collaborative, ongoing, school-based professional development. It also brought this disjoined staff together. It was, as John said, developing a team ethos, an esprit de corps that would be the basis for further discussions and ultimate planning for restructuring. I also believe it provided the supportive atmosphere for Glen and Val to come forward to discuss their ideas of classroom teaching. I also started to see my leadership role differently. We started developing a collaborative and reflective culture, with teachers as leaders, and a rethinking of the role of principal.

Narrator: So that’s how the Jubilee project started?

Gary: Partially. To the fertile soil and favorable growing conditions just outlined, two other ingredients were needed for the sprouting to occur. And none of them happened in isolation. They are all connected to each other, neither not necessarily planned that way. The next contribution was from an outside source. In reality, it was the atmosphere and excitement that was permeating the school division. Specifically, it was the beginning of restructuring discussions by the secondary principals of the division, an enhancement to the events at Jubilee school.

Fertilizer.

Narrator: How did that come to be?

Gary: Why not let John, the Curriculum Director, fill you in as he was partially responsible for getting the ball rolling, so to speak.

John: Our principals’ meetings in Yellowhead School Division were pretty traditional. Our agendas included typical items such as new formulas for teacher aide allotment, problems with the month-end maintenance requests, the structure of parent advisory councils, and the most sacred of all items – ‘capital replacement’. If you were a fly on the wall at any one of these meetings, you would have had a difficult time defending the notion that the term ‘principal’ is actually the shortened version of the original term ‘principal teacher’. Such a title was bestowed upon deserving educators in school settings in the early decades of this century. What had
happened? What had principals' meetings to do with education? The more the meetings continued in such a manner, the more concerned I became (p. 38-39).

Gary: As leaders, we sure weren’t modeling the philosophy being espoused in the BATPIG project, ongoing, collaborative, school based professional development.

John: No, basically the deputy superintendent acknowledged that the monthly administrator gatherings were not as productive as he thought they could be because they were, in his words, too “organization-driven”. He felt that principals were designated to be in charge of a school and that these same principals were quite capable of implementing board mandates at the school level. Therefore most of the “administrivia” that had been the focus of our traditional gatherings could easily be handled through the memo process. Instead, he suggested, these administrator gatherings could and should take on a different focus, one that was process-driven; one that involved a focus on building relationships among colleagues (p. 39-40).

Gary: Yes, I remember that speech, it really did catch our attention. But at the same time it was not a shock to me as I had already spent a year working in the BATPIG initiative, both as a member of our Jubilee team and the Divisional BATPIG steering committee. His speech was just another reason to get excited about education and restructuring.

John: That simple address had a significant impact on future gatherings and, ultimately, on the culture of the world in which administrators dwelled. The school administrators welcomed the direction as a timely piece of insight. In preparation for our next gathering, I was charged to come up with what they coined ‘a zinger’ – something educationally provocative – that would serve as a springboard to reflective dialogue among these educational leaders (p. 40).

Gary: That’s right, I remember the booklet you put together for us to read as the jumping off point of our future discussions. We received it two weeks before as homework. It was an eclectic group of readings and concluded with an interesting ‘zinger’.

John: It was 1991 and much of the literature dealt with the notion of restructuring schools. I included pieces from many of my favorite authors of the time – Roland Barth, Michael Fullan, Howard Gardner, Carl Glickman, Phillip Schlechty, Theodore Sizer and so on. I then prefaced the package with the requested ‘zinger’, which went something like this:

“Any student demonstrating competence will, upon leaving Yellowhead School Division, be issued an educational warranty.”
The administrators arrived at the meeting and appeared to be brimming with an enthusiasm that was heretofore unwitnessed (p. 41-42).

**Gary:** Yes that was a pivotal meeting. I was truly excited and motivated to get involved in the dialogue and action that would follow. It was certainly appreciated by a second year principal who was also involved in similar discussions at the school. I was receiving energy from both levels, my colleagues at Jubilee and my principal peers. I also must say that you and the Deputy Superintendent were very supportive and had trust in me to handle the school level challenges. The next few secondary principals’ meetings were very interesting. We started to question the status quo and as you are wont to say ‘think otherwise’. I also remember that you went to have discussions with personnel at Alberta Education about our “transformational” discussions.

**John:** Generally speaking, these people at Alberta Ed are excited about a school division taking such an initiative and if there is any way they can help us (ie. Cut the bureaucratic red tape), just let them know. (Memo, Martini, 1992)

**Gary:** Well, that sure was the impression I got as we at Jubilee started to “think otherwise”. But there was one other outgrowth of the secondary administrators’ new paradigmatic thinking. As I remember it we got quite excited and wanted to share this feeling of exploring options but we felt that we needed to involve teachers.

**John:** Simply put, [we] felt this new-found emancipation had to be experienced by teachers. As one principal suggested. “We’ve had the time and opportunity to dialogue and to engage in this experience. The teaching staff hasn’t. Somehow we must provide such an opportunity (p. 49-50).

**Gary:** Yes, and as a result a committee of principals, including elementary principals, planned and implemented a two-day workshop. We wanted to share our beliefs that we, as public school educators, needed to change our pattern of how we went about the practice of teaching.

**John:** At such an in-service, we could pass on a message of support for ‘thinking otherwise’, for restructuring schools; for challenging age-old traditions and conventions that have been near and dear to the hearts of educators. In other words, we could formally announce that they had a green light to begin doing business differently (p. 50-51).

**Gary:** Yes, it certainly was how I was feeling, I was “pumped” as they say today. I was not only seeing the possibilities, but I had a core of the teachers at Jubilee that were with me.
John: So the die was cast. In the spring we would welcome over fifty teachers representing each of our schools. The ratio of participation was roughly 1:6 as far as our total teacher population was concerned. As we were in the middle of the Gulf War of 1992, the gathering was appropriately named “The Mother of all In-services” (p. 51).

Gary: Yes, but I also see it as the beginning of a number of exciting changes in our division and in our school. It was the birthing of many new initiatives, thus the “mother” of them. We provided a booklet of readings similar to the first secondary principals’ meeting that provided the springboard for the activities of the two days.

Narrator: So how had all this activity at the division level influenced what was going on at Jubilee? You said there were four ingredients that contributed to the beginnings of the large group instruction?

Gary: Indeed, all of the collaborative work that was being carried out at our school was what led to the start of large group instruction. In fact, the next condition was the critical mass incident. It was the seed for the next step in the growth of this dynamic project.

Narrator: So what happened?

The seeds.

Gary: There were so many things going on in Yellowhead that I was quite excited about the theoretical discussions that were being carried on at all levels. I was questioning the structure of the schooling that I had participated in over my last fourteen years. My arrival at Jubilee and the resulting two years of struggling with being principal led me to question my working reality.

Val and Glen: That’s when we approached Gary with an idea.

Gary: Yes. I remember that day in the staff room. You were testing me to see how I would react. Was this the first time you talked about it?

Val: No, Glen and I talked about it across the hall in a wishful thinking mood, off and on, you know, what do we do? (Trans1p.13)32

Glen: Yes, Val, who taught Math and Science across the hall from my classroom, and I began a dialogue based on notions of team teaching and our beliefs about educating junior high students [in the mid 1980's]. We found that we shared many of the same concerns regarding: student motivation

1. the difficulty in the tracking of student progress

32 This set of numbers and letters is a reference to the interview transcripts.
2. the restrictions of the traditional timetable
3. the large numbers of students (up to 150) that we saw on a daily basis,
4. the lack of student accountability for behavior and learning
5. the lack of parental involvement in their child’s education
6. the disconnectedness of our subject matter
7. a general feeling that, despite our hard work we were somehow failing to provide for our students (Thiel, 1997, p. 1).

Val: Then when the previous principal moved into the building, we ran it by him once and he said that we could never have two rooms, side by side, and we could never put fifty kids in one room, because of fire regulations. We wanted to set-up one room as a teaching room and then one room as a work area. He said we could not so we let it go (Trans1p. 13).

Glen: Thus our ideas remained just that. However, the dialogue continued and expanded to include other colleagues who began to think similarly. By the early 1990’s the school administration had changed and the new administration shared our vision of reform (p. 2).

Val: Yes, you hit the building and then after that first BATPIG experience, we talked about it, probably behind your back a lot and when we kind of felt secure we approached you and we asked if we could try it and were quite shocked when you said yes (Trans1p. 14).

Gary: I really was quite interested in your idea. It was different but made sense. It seemed to be a practical way to achieve the vision of junior high education that we had been discussing and all the authors of restructuring that I had been reading were proposing. At first we played with this vision of a new school, brainstorming, sometimes half joking. But the ideas were based on the first hand experiences of Glen and Val.

Glen: Generally speaking, our students represented an amalgamation of students from seven much smaller elementary schools who were thrust together in the traditional junior high setting with little consideration being given to the number of teachers they saw each day and the general social climate in which they found themselves. We sensed that many of our students were feeling lost, that they did not really belong anywhere or to anyone. This perception led us back to our relevant questions involving:

1. students taking ownership for their own learning
2. a sense of belonging,
3. more student, parent and teacher accountability (Thiel, p. 1-2)

Gary: Yes those were the same frustrations that I had experienced over my first fourteen years of teaching junior high students.
Narrator: What happened next?

Gary: Well, by the end of 1991, well into my second year, I decided that we had done a lot of talking but we had not taken any action to move toward our vision. So I arranged a meeting with the Superintendent, Deputy Superintendent and the Curriculum Director. I outlined, in the sketchiest terms, our vision of a "new" junior high classroom. They were very interested and suggested that we put together a presentation for the Board of Trustees and apply for some of the R and D funding that had just been set aside for just this kind of innovative project. I reported back to the core group of teachers and we began the process of planning.

Up until this time our discussions about our vision had been playful, half-serious, brainstorming ideas and models of schooling. But now we had to put our ideas into a concrete presentation for the board. Two weeks before the board presentation we did a trial run on the Jubilee Staff. There was a lot of interest and excitement. John had been part of the planning and introduced us to the Board as follows.

John: Over the past few years at Jubilee Junior High School, a few teachers started talking about POSSIBILITIES. Not the usual "get rich quick" possibilities or the possibilities of early retirement, or perhaps even of the possibilities of getting another line of work but of genuine, heart-felt possibilities with students. They dared to think of the possibilities open to students if only a few structural changes could take place. The tremendous possibilities if a few teachers could dare to talk to each other about their subject domains and to possibility integrated them making them more meaningful and relevant to our young subscribers. These possibilities lead to further, what ifs. Could we eliminate bells? Could we create greater group dynamics? Could we use cooperative learning? They dared to approach the principal, Mr. Gary Babiuk. To their sweet amazement, Mr. Babiuk liked their idea. He carried their dream one step further and encouraged them to draft up a proposal with the ultimate goal of taking it to the Board and, hopefully, gaining their support and eventual official assent (SOAR Presentation Script, Board Meeting, March 1992).

Gary: Thus began the presentation. We outlined our personal beliefs regarding teaching and learning. We concluded the presentation with an example lesson in which we had the members of the board completing a hands-on integrated lesson, including a scientific measuring problem, mathematical calculation and language arts writing assignment. We also presented our symbol, an eagle soaring over the world with students, teachers, and community members
circling it, hand in hand. We gave our project the name SOAR – Striving to Obtain Academic Richness.

**Narrator:** How did the presentation go?

**Gary:** The presentation was a success and we were granted sufficient funds to provide for planning for a year and implementation the next fall. The superintendent of schools agreed.

**Super:** SOAR fell clearly into the area of a brand new way of looking at instructing children, students of junior high. It was viewed to be a very creative project and so we had no problem approving the release time for the teachers. The board had no problem passing it according to the rules that they had set up for the R and D Fund. In fact, the project was probably one of the special ones of all the approvals. It was quite unique actually (SUPp. 7-8).

**Gary:** It should be realized that our SOAR planning was not going on in isolation. The board presentation occurred in March. At the same time I was involved in co-organizing the Mother of All In-services that was set for April. Our BATPIG team was still meeting and working at inter-visitations at Jubilee. As well, we began to solicit input from students, parents and community members during the months of April and May, using a survey, a Parent Forum, and a SOAR presentation to the Parent Advisory Council (PAC). These meetings seemed to indicate we were on the right track from all quarters: parents, students, teachers, and board members.

**Narrator:** Where are we now? How close are we to the actual implementation of the project?

**Gary:** The SOAR team began to do their official planning in September of 1992. The R and D funds were used to provide 30 days of substitute time. The SOAR team was able to meet during the creative time of the day, not just after school and on weekends. The grant from the school board covered the financial aspect of freeing them up during a school day, but it still meant the SOAR teachers had to prepare the substitute’s lessons for their regular class, a double planning load. Their planning time was spent clarifying vision, objectives and expectations. We were able to set up, in a small utility room, a permanent planning area where they could leave materials. However, the 30 planning days were only a fraction of time spent over that year. The bulk of the unit and lesson planning was done on weekends and during their summer vacation (Babiuk, in press, p 4).
Super: It was just phenomenal the amount of work they had done. And it's that kind of excitement that I sensed was quite contagious. And when ultimately you all came before the Board and you spoke about that, that very same excitement was certainly translated to the Board of Trustees as well. They were quite excited about it at the time and saw a lot of potential and I mean their feelings were genuine (SUPp. 4).

Gary: But we had one major practical consideration left, the large group classroom. The school board had also agreed to renovate two existing classrooms into a large one during the summer break. Finally, materials were collected; research articles were read and discussed; a vision was created; and detailed lesson plans made. But as most teachers will tell you, no amount of planning will prepare you for the real thing. So there we were, maybe not as ready as we thought, but certainly ready to at least get our plans off the drawing board. The seed was about to sprout.

Scene Two - Resistance / Germination

Narrator: Here in the words of Sandy, the third member of the SOAR team, is a description of the first encounter with large group instruction.

Sandy: I remember watching those kids come in the door that first day. Nothing could have prepared me for that feeling, because it was overwhelming, it was like, "Oh, so this is what it looks like with 75 kids in one room". And the actual processes of trying to get 75 kids to find a specific desk in this large room and they don’t know which way is up, was like total disorder (Translp.14-15).

Narrator: This first feeling of horror to the experiences of the SOAR team members as they completed the first year is described next. It is a description written with the help of the SOAR team in 1995 (Babiuk, 1996). It was written metaphorically, also using the journey metaphor (Drake, 1993). It describes education generally and Jubilee specifically as a sinking ship.

Gary: So it was with the launching of the lifeboat SOAR. The first year was fraught with danger, hidden shoals and craggy rocks. These hidden dangers were presented by students, parents, colleagues, and the team itself. Students saw another Grade 7 students in the traditional timetable and felt that was the desirable image of junior high school and wished to move. Some parents wanted the return of marks and grades. Colleagues were skeptical of change, and the
SOAR team had interpersonal eddies to overcome. As principal, I also was in the lifeboat but more as a pilot, a guide, who although not in the classroom everyday, was the person that teachers, parents, and students came to see with their concerns.

Anxiety and frustration were always present. The workload was so great that this was the first and constant stress point. With the daily planning and the excessive evaluation of student work, not to mention having to create everything from lesson plans to student reports from scratch, the SOAR teachers' personal lives were being affected. With mutual support and encouragement from the administration (principal, vice principal, and curriculum director) and family members, they were able to survive.

The uncertainty and skepticism of many colleagues and parents caused another anxiety. This kind of subtle criticism wore them down, but with successes in the classroom, support from some teachers, and the administration, and most important, parents, they were able to cope. Most of these conflicts were not due to a lack of belief that integrated curriculum is the right way to go; nor were they disputes about subject-discipline territories. Most were the result of the tendency to slip back into the individual, discipline-focused lessons. Each time, the team members needed to reaffirm their underlying beliefs and philosophies about what is worth teaching and how.

The use of learning outcomes instead of marks created a definite conflict, especially with parents. However, with the movement of the school division towards exit outcomes and away from grading, central office support was a constant. In fact, the breakthrough moment in the SOAR program came as the result of the move towards outcome- or result-based evaluation and authentic assessment. As the team stated “one of the most powerful features to have been developed was the student-led parent-teacher conferences”. The first conferences were held in the Fall. Each lasted about 20 to 30 minutes and was led by the student. Students presented their portfolio, which included examples of exemplary work, work in progress, and possible areas of improvement. Students also evaluated themselves and set goals. Teachers added to the profile of the skills, knowledge, and attitudes demonstrated by the students during the period. Many parents stated that it was the first time that their children had discussed in detail the progress of their education. This first set of interviews offered the first overwhelming, positive feedback and confirmed in our minds that we were on the right track not perfect by any means, but moving in the right direction (Babiuk, 1996, p.6).
**Narrator:** It was at this time that you felt you had to make a decision about the future of not only the SOAR project but its implications on the rest of Jubilee staff?

**Gary:** Yes. Throughout that year, the project was watched closely by everyone involved, the SOAR teachers, the Jubilee staff, the Superintendent and Central Office staff, the Board of Trustees, parents and the community. The overwhelming sentiment of the feedback was positive.

**Narrator:** Here are some comments from the superintendent and a trustee.

**Super:** I was invited to speak on two occasions. One of the occasions was I had to teach a Math lesson to the whole group and the three teachers. In fact, John Martini was there, too. They were all assistants and helping me. Then when I was finished, I had the pleasure of working with the kids as well. I also just dropped in every so often. I mean, it was such an open door policy that I could just walk in, wander around, talk to students and wander out again. Nobody would jump up or be nervous about it. It was a beautiful environment and I really enjoyed that.

**Trustee:** Yes, I’ve been a guest in large classrooms. Saw stuff I really liked. I saw teachers on task and kids on task. I saw, knowing the people whose classroom I was in, I didn’t see a show, I didn’t see what I was supposed to see, I saw what was going on. And I was very pleased. That’s good stuff. Damn good stuff.

**Narrator:** Here is another indication that things seemed to be going well, a newspaper article in which the reporter interviewed not only the principal and the SOAR team but parents and students.

**Reporter:** SOAR works for Charlene Berube’s daughter Kailey. Berube explains prior to junior high her daughter was an average student. "She’s been on the honor roll since she started SOAR. She seems to be excited about school". Berube is also convinced that under SOAR her daughter and other students are getting more individual attention when they need it. "I’m actually really pleased with it," said parent Colleen Kimak, when asked what she thought of SOAR. Kimak has a son in SOAR. Fellow student Kelly Tuftin was also impressed with SOAR. "It’s nice – a lot easier to do the work." Tuftin said he was also getting more individual help under SOAR. (Edson Leader, April 25, 1994, p. 8).

**Narrator:** The SOAR team was requested to update the Board of Trustees early in 1994. Here is a summation presented by Glen.
Glen T: In our professional opinion SOAR is going very well. It is not perfect everyday and not perfect in every way, but each day provides us with new challenges and opportunities to interact as a community of learners.

We are not without our problems, but they do not seem insurmountable when we work together.

We have come to realize that we need to keep an open mind and an open heart.

Our belief about the SOAR program is: we would not want to go back to teaching the way it was before we began this program. It is far too valuable to us as a learning tool for students, parents and teachers (Board report, Feb. 16 /94).

Gary: As well, the SOAR team created Parent Survey sheets to gather feedback after each of the student-led parent-teacher conferences. I also gathered feedback using a survey questionnaire. Here are some general comments:

“The teachers were very helpful and never minded answering any questions or concerns. I felt that they genuinely cared.”

“The children seemed well motivated and enthused. My child’s self esteem was very good.”

“SOAR to me has been a total success for my child. The student-led conferences are great!”

Of course there was criticism and suggestions of how to improve. They mostly fell into the student evaluation realm, with some parents wanting some form of marks or grades, and further improvements in communication to parents of behavioral problems and missing assignments.

Narrator: How did students feel?

Gary: As the previous newspaper article outlined, most were happy with their year. But of course we had some students (as is my experience in 23 years of teaching junior high school) who misbehaved in class and that caused some concerns for other students and parents. Over the first year, 13 students transferred out of the program for many reasons, some because they wanted to be in what they thought was the “real” junior high. Some parents wanted marks and there are always a few conflicts between parents and teachers concerning how their child is behaving. However, it should be noted that 15 students transferred into the SOAR classroom to offset the losses.

Narrator: It looks like you are moving toward a pivotal point.

Gary: Yes, but it should be noted that other things were happening in the School Division, as well that would influence our thinking. The strategic plan was being developed and implemented. That included the student exit outcomes based on the William Spady model. In
fact a three-day workshop was planned for May, which all employees of the Yellowhead School Division attended. This included all teachers, support staff, bus drivers. The community was also invited to all of the sessions. It was quite a kick off to the strategic plan. At Jubilee we had bought into outcome based student evaluation and lesson planning. We had developed our own Five-year Plan that included expansion of the SOAR project.

As the SOAR team moved toward the end of their first year, successes started to outweigh the setbacks and required us to answer an important question, should we begin to implement the team teaching approach throughout the rest of the school? A decision was even more urgent as the school building was to be totally renovated, starting that summer. Jubilee had been built in 1960 and, although their had been two additions, the gym and the northwest wing, the major infrastructure, heating and lighting were original and in need of replacement. The school division was unable to secure provincial funding and so the board had approved over a million-dollar outlay of funds for the renovation.

Taking all of this into consideration and after discussions with the superintendent, school board members, teachers and the parent council, we decided to move ahead. This had been our overall vision from the beginning and if we wanted to move toward it, large group instruction areas had to be included in the renovation plans. Our plan was in reality a five-year transformation, which included the whole school. Accordingly, a call went out to the rest of the staff to form two more instructional teams which would start their own SOAR style project in the fall. The only direction given was a position paper I had written to outline the four major premises that teachers should follow in the development of their unique teams. These four building blocks were team teaching; outcome based authentic student assessment; integrated curriculum; and a community focus. Accompanying these four guiding principles was a reorganization of the hierarchical structure of the school’s leadership. (See Appendix M for more details). After presenting the position paper to the whole staff, I asked them to self choose teams and present a written statement of their intentions.

**Narrator:** How did the next two teams come together?

**Gary:** Why don’t I let the members of the teams tell their story. First the CALM (acronym for Communicate, Achieve, Lead, and Motivate) team, Jerry, Larry and Tina.

**Jerry:** I didn’t know what was going to happen or how it was going to come out. In the traditional [classroom], I was in a rut. I didn’t like teaching. I was thinking about trying
something different, until this came up and when it did, Tina was the one who influenced me. I asked her as soon as you mentioned this was going to happen (Trans1p. 9).

**Larry:** We looked at the possibility of groups happening. There were a number of discussions of potential grouping. We looked at each other and said, “Well what do we think about it? It’s going to happen, are we willing to try it now or do we want to wait? What are your areas of strengths and weaknesses?” We spent a few days sort of spending some time with each other and talking. I don’t think we really understood. We looked at professional capabilities and then we assumed that the personal relationships would somehow work out (Trans1p. 30).

**Narrator:** What about the other teams?

**Gary:** Yes, TEAM (acronym for Together Everyone Achieves More), made up of Charl, Wayne, and Bill, can explain.

**Charl:** I think, we knew it was coming down the pipe. So we knew sooner or later we’re gonna have to do it. So we began looking around for whom we would like to work with. So Wayne and I talked about it. And we said, what we’re missing is PhysEd and Social Studies and we thought, and neither of us are good public presenters and Bill was perfect. He was a wonderful presenter, very dynamic, [and he had a background in] Social Studies and PhysEd and he was just perfect in fact. He was probably a lot of the strength of the team (Trans1p. 14).

**Gary:** Then each team submitted a proposal to me. There were only two submissions for that year and so I asked them to begin to prepare for the next fall.

**Narrator:** Here are some other thoughts from teachers as they planned and prepared for teaching a large group classroom the next year.

**Tina:** The SOAR group gave us some advice and we talked to them. So that’s been really good. I was worried at first that you would sort of feel a competition with the people who weren’t in groups and people who were, or maybe the groups against each other. I didn’t want it to be a competition, one is better than the other, because that wasn’t the purpose of this, and everybody seemed to work really hard at making sure that it wasn’t an issue. Lots of the people in this school who weren’t in teams would come and ask questions and give us advice, too. (Trans1p. 28-29).

**Charl:** When we went into it, you [Gary] were giving us all that reading to do, all those handouts. So when we started meeting for our planning, we had a reading background. I don’t think anyone realized it at the time, but even if you disagreed with the articles, you had been
promoted to think. Then I think we broke down what we thought were trouble areas and how we were going to handle this and of course, we were very lucky cause we were the class after SOAR and of course whoever does it first is gonna make the biggest mistakes. I mean, SOAR was the talk of the hallways. So we were able to benefit from their experience; because they had gone first. They had broken the path and we were able to say, no, we don’t want that, but we want this (Trans. p. 14-15).

Gary: This brought the first year of SOAR, specifically, and large group instruction, generally, to a close and saw the beginning for CALM and TEAM. These two teams did their planning using the R and D funding, but because there were two teams, they had only half of the funding of SOAR, although we were able to supplement it from school funds. The major refurbishing had been officially ordered by the board of trustees and was to begin in the fall. But because we had two teams slated to begin, both of which needed a large classroom, the schedule for gutting the school began in June. Two portables, with eight classrooms, were used to house the displaced classrooms during construction. The plan was to complete the two large group-teaching areas on the lower floor by September.

To add to this confusion, I had been granted a sabbatical leave and had been accepted in a doctoral program at OISE. I was leaving in the middle of a major curricular change and structural change. But, again, part of the BATPIG legacy was we were attempting to develop a reflective culture at Jubilee and that meant that I as principal was only one of the people involved in the change. Thus I was not the change itself but only one of a staff. So, we choose one of our staff members to be the principal. Andy, the vice-principal, was leaving to take on a principalship in another school in the division. At the same time, the division was doing away with the vice-principal position and replacing it with an administration team. The move accompanied a central office downsizing which included, the elimination of the Curriculum Director’s position. One of our main supporters, John Martini, chose this time to leave education. All of this would influence the future success of the project. But mainly spirits were running high, things were going well, the dark clouds were still off in the distance, not visible.

Scene Three – Separation / Sprouting

Narrator: Here is what one of the teachers from the CALM team, Tina had to say about how that second year started, the first year for the CALM and TEAM teams.
Tina: We had our own meeting in September. Granted, not everyone was there [parents], but I would say it was a pretty high turnout. They had some really relevant, valid questions and we addressed them. Once we went through them and talked about our philosophy about quality [student work standard] and our philosophy about doing the best you can, the flexibility this program would offer, and really getting to know their kids, it seemed like they all went 'oh, this is good' (Trans1p. 31).

Narrator: Was that meeting just for your team or both?

Tina: Just ours. I'm pretty sure TEAM had one, too. We sent a letter home about our philosophy and this was all in the letter. And then when they came that night we just reiterated it, and it was like they sat back and went “God, this isn’t as [bad as we thought]”. It was like a big collective sigh of relief, which was nice. We probably had two or three meetings in the first year just to make sure and we also did surveys when we did the student-led conferencing. We really did make sure we did a lot of talking and made sure we did a lot of PR with the parents, phoning home (Trans1p. 32).

Gary: Like SOAR, the TEAM and CALM teams found that after the first student-led parent-teacher conferences, when they got so many people in and they saw that their kids were actually doing constructive learning activities, the parents felt more comfortable with the classroom. But there were still the ones whose kids weren’t performing and they blamed it on the classroom.

Narrator: So that second year was not without its turmoil?

Gary: No. There were a number of meetings with parents for each of the three teams, SOAR, CALM, and TEAM. In each instant there was an effort to discuss the parents’ concerns and develop plans to solve any difficulties.

Narrator: Here is one example, excerpts of a letter from the Chairperson of the Jubilee School Council\textsuperscript{33} to the Superintendent of the School Division after a meeting March 6th, 1995.

Chairperson: We first reviewed the reasons behind starting the pod [large group] classes and how the concept of such a large class is working. Parents are pleased to see the teachers doing their best and trying to encourage students to stay motivated.

\textsuperscript{33} School Council was being reorganized by Alberta Education during this year and School Council became the new name for the former Parent Advisory Council, PAC.
I would also like to take this opportunity on behalf of school council to express that parents are strongly behind the staff on their efforts to improve student conduct. We need to work toward and insist on positive student behavior and conduct to ensure that our students get the most out of education. (Letter, dated March 18, 1995)

**Gary:** It's interesting that there was reference to the wish by some to return to the traditional, single classroom. I was away on sabbatical and, thus, did not pick up on these feelings, as I did not return to the school until May, when I conducted an integrated curriculum workshop. My discussions with Fred, the acting principal and other members of the administrative team indicated that although there had been some concerns expressed by parents, the staff felt that they had addressed them, and would continue to monitor the situation.

**Narrator:** You mentioned the administration team. What was that?

**Gary:** Well, in the spring of 1994, Alberta Education was restructuring education. As part of the school division's attempt to get into alignment with provincial directives, the position of vice principal was eliminated and each school was to develop an administration team, to replace the vice-principal. Here is the superintendent's explanation.

**Super:** The three-year Business Plan (1994/95 – 1996/97) of Alberta Education contains nine goals of which nearly one half are related to restructuring the governance and delivery of education in Alberta. The main thrust of this Business Plan is a strong provincial direction for education, reducing layers of administration and allowing schools and their communities to make decisions that directly benefit their students. (Paper by Puhlmann, March, 1994)

**Gary:** So in order to comply, we at Jubilee choose to organize a team of six teachers to act as the admin. team. One teacher was to be internally chosen from each of the three teams, SOAR, CALM, and TEAM. Three other teachers were selected from the remaining staff, who were still in traditional single classrooms (about half). But we planned to choose new members for the admin team as the new teams came on line in the upcoming years.

**Narrator:** Was there anything else happening at that time that influenced the situation at Jubilee School?

**Gary:** Within Jubilee we had our own little challenges and issues but at the school division level we had a change of trustees as the result of elections. As well, central office was downsizing, so there were fewer people providing leadership and advice. The divisional strategic plan was in its third year and the OBE initiative was being transformed into implementing the
student exit outcomes. Many Jubilee parents came to see the OBE initiative as being the same as large group instruction. In other words large group instruction was responsible for them losing their “precious” marks. They did not see that it was a district strategic plan not only part of the Jubilee project.

Narrator: The superintendent and a trustee also outline the changes that were occurring at their level.

Super: There were also things like the first year of the provincial achievement tests [in all four core subjects]. They were just introduced and so when the kids didn’t do well, guess what it was? It was large group instruction that did it (SUPp.15).

Gary: The election of the Board of Trustees in November was combined with the amalgamation with Grand Cache and later Jasper. That meant that we had at least five new board members.

Trustee: On the board we got three people, three new people with no experience in the field, no professional experience in the field of education or any experience as a Trustee. We got two trustees who were new to the board, who did have a background in trusteeship, but no professional background in the field. So yeah, it was a period of massive change (BAp. 4).

Gary: There was a major shake-up going on inside Alberta Education as well. It was wider than just Jubilee (BAp.4).

Trustee: You bet, so this [Jubilee project] was one change in a veritable storm of changes (BAp.4).

Narrator: What was the main change to the educational situation that you felt on your return from sabbatical?

Gary: The environment in which we had developed our own vision of large group instruction and five-year plan, was changing. I saw a total turn about from the excitement and encouragement of the first four years. So that at all levels, the openness for “thinking otherwise” that I felt, the staff felt, closed down and the atmosphere seemed to discourage innovation. There seemed to be a return to traditional values at the provincial level and away from the encouragement that was given during our secondary principal meetings and BATPIG work. It certainly filtered down to the divisional and school level.

34 Two new communities added to the school division and 200 kms west of Edson.
However in the confusion of the renovations at Jubilee, my year long absence, and the changes going on in the province and school division, two more teams ORCA (acronym for Obtaining Rich Constructive Achievements) and RIGHT (acronym for Realistic Intelligent Goals Highlight Teamwork), came forward with a proposal. The ORCA and RIGHT teams worked through the spring to prepare for the fall start up. The construction at Jubilee was completed in the summer with two more large classrooms ready for these two new teams to begin their three-year odyssey with their community of students. Everything seems to be moving along according to plans. I returned to Jubilee from sabbatical leave in August to prepare for the next school year.

**Scene Four – Struggle - Conflict / Struggle to Grow**

**Gary:** At this point, the fall of 1995, we had five teams of three teachers; one at grade nine, (SOAR), two at grade eight, (CALM and TEAM), and two at grade seven, (ORCA and RIGHT). The two grade seven teams were formed the same way the others had been, by mutual consent and voluntarily. The two grade eight teams were intact, except TEAM had to replace a teacher who had moved away. The replacement teacher had been hired before I had returned in August. This left about seven Jubilee staff members not in teams. They were either French Immersion teachers who had remained in traditional small group classrooms, option teachers in band, home economics, and industrial arts, or teachers of the other half of the grade nine traditional classrooms.

Similar challenges of creating a community of learners within the classroom and getting parents to participate as partners in their child’s education were present in the beginnings of the third year. Our main concern seemed to be how we could construct another large group instruction classroom and form the remaining team before the next school year. We had a number of ideas about ‘where’, but a team had not come together. There was a chance that I would have to assign teachers to a team instead of it forming on its own. There was an urgent need to bring together all the teams and collaborate on our future direction of our school community (Babiuk, in press, p.8-9).

**Narrator:** So what did you do next?

**Gary:** Well, as I was returning to Jubilee after a year away, I was trying to catch up on what had happened in the previous year in relation to our five-year plan. I began a systematic series of observations of each large group class. The admin. team had expressed the need to get
the staff together and bring some consistency to the process of student-led conferences and progress reports that parents were presented at the interviews. My observations of the large groups also indicated that there seemed to be unique interpretations of team teaching. So the admin team and I developed a series of workshops, staff meetings, and in-services to address these concerns. As well, we had received the first set of provincial results of the Grade 9 Provincial Achievement Tests (PATs). The results were not very good and we wanted to ensure that these results would be considered in our overall evaluation of our school’s student evaluation process as the first large group class would write these provincial tests at the end of the school year.

We had moved away from marks and replaced them with student-led conferences and student portfolios, and felt we were following the board’s OBE initiative. It was the first semester, we were dealing with issues as they developed and looking forward to further consolidating the changes we had initiated when some parents formed a lobby group that was to alter our direction.

**Narrator:** Lobby group?

**Gary:** Yes, it was the name I gave the organized group of parents that would come together to oppose our large group project. In early January of the third year at a parent council meeting we heard rumors that a public meeting was to be held concerning the changes going on at our school. I was informally advised not to attend. I had also been shown a letter written by a concerned parent that had been sent to a board member earlier in the month and I was waiting to meet that parent. The board member, however, encouraged this parent to further investigate her position. A “town hall” style meeting was the parent’s choice, which was advertised in the local paper and scheduled for January 31, 1996. This was to be a parent meeting only. Teachers were not invited, but the local newspaper was. Two of our teachers went to the meeting, as they were parents of students at our school. They reported their observations of the meeting to me the next day and they were not encouraging. It seemed the parents were against all the changes made at the school, particularly the most recent grade seven teams.

**Narrator:** The following concerns of the parents were summarized by one of the teachers that attended the meeting.

1. **Commitment:** Teachers speaking openly about their lack of commitment to the program to students and parents.
Evaluation: Lack of a formal and thorough report sheets, no formal parent-teacher interview component to the Student-led Parent-Teacher conference.

Marking: Parents concerned re: student inaccuracies in the marking of student work.

Math: Concern re: level of math instruction and the amount of help students are receiving in Math.

Group Punishment: Parents concerned re: group punishment techniques, unfair and perhaps unreasonable.

Communication / Consistency: lack of communication with other groups Re: how things have been done.

Here is Glen Theil’s comment after attending this meeting.

Glen T: These people want their marks no matter what, absolutely no matter what! You can’t change the minds of these parents. They were not saying that it doesn’t work but need a choice. Parents want a choice. A well run and structured meeting. Some people misinformed and some questionable stuff but general concern for their kids. They want the best for their kids.

(Report form Glen, January 1996)

Gary: This was our first real indication of “serious” trouble. Up until this point, we had been able to deal with parents’ concerns at a class level. But this was a larger group of parents, some of whom did not have children in our school yet (Grade 5 and 6). To this point I had not been visited by any parent. The School Council Chairperson (formerly the Parent Advisory Council) had also attended this meeting and discussed it with me the next day. She was a very positive person and wanted to be open to discussions about the school. But up until this time, no one had attended the regular monthly School Council meeting and expressed their concerns so vehemently. Also, the new grade seven teams were already addressing many of the concerns (based on observations in November) expressed by parents in the meeting, as they became more experienced with the large group team teaching format. However this was not considered at the town hall meeting, which would become the primary form of communication between the lobby group and the staff of Jubilee.

Narrator: On Monday, February 5th, the local newspaper ran an article with the following headline, SOAR under gun

Gary: It covered many of the same points that Glen had indicated to me. It also asked parents to write to the parent who had organized the meeting, with their concerns. In the same issue there was a letter to the editor that the paper chose to run under the headline in large bold letters, SOAR has gone off the rails. It was from a parent, who had a child in SOAR and was
very satisfied, but her younger child was in Grade 7 and things were not going well, in her mind. She demanded choice and threatened the board. It was an indication of things to come; high emotion, fear, and a lack of real communication from both sides, the Lobby Group and the school staff.

To muddy the waters further, so to speak, some parents were discontented with the school division in general for implementation of past programs and initiatives. Bus funding was a contentious issue at the same time as the province was cutting funds and parents were being asked to pay more for a formerly free program. Feelings were running high and there were a lot of angry people on both sides. We at Jubilee were caught off guard, for the newspaper had not come to interview any of the team members, or myself. The editor had decided to run the article without talking to anyone at the school. The vast majority of the parents of the lobby group had not attended any of the school council meetings that year to present their concerns; nor had they come forward to discuss concerns with any member of the administration or staff members. Subsequent to the first town hall public meeting, the Chairperson of the School Council invited the parent who had led the town hall meeting to the next School Council Meeting. At the meeting, the parent did state that her committee was gathering input from the parents, but was very guarded about the content and direction of the presentation her group was going to make at the next School Board meeting. Neither she nor any member of the Lobby Group came to talk to me. It was as if they didn’t want to hear what I had to say, for it seemed they had made up their mind as to what they wanted.

**Narrator:** What happened next?

**Gary:** The next week, there were two more letters in the newspaper expressing parents’ opinions. One was from parents whose child was enjoying the experience but their beef was that they didn’t know how he was doing “academically”. What were his marks?

**Narrator:** Here is an excerpt from a letter to the editor entitled GYRD board must respond.

**Parent:** You are hearing loud and clear that a choice in programming for the junior high school is needed.

The Grande Yellowhead School Division exists because it is provided funds from the citizens of the division to act in their behalf. You are elected by the people, and you are
responsible to these people. When you have this much concern, you must respond (Edson Leader, February 12, 1996).

**Gary:** The other article was from a parent of a student in grade 7 and a former teacher of the division. She would become one of the leaders of the Lobby Group. It is an interesting article as it has many half-truths mixed with truths and misconceptions.

**Narrator:** So what they were saying about the situation, was it true or not?

**Gary:** Each statement has partial truth and the people at the town hall meeting spoke without having to corroborate, or even allow rebuttal. No one from the school ever got a chance to talk to each of the issues raised. They were wrapped together into one package and called SOAR, or POD, and all complaints were discussed as one. The letter really sets the tone for the next four months. I still don’t think I fully realized the extent or magnitude of the feeling of this group, but that was soon to change. It just so happened that the next Board Meeting was to be held at Jubilee School. This had been arranged in the fall, as it was to be an opportunity for the SOAR team to update the board and for the board to tour the newly-renovated school and visit with the other teams. The lobby group’s presentation was coincidental, but the scene in the crowded overflowing Jubilee library and the negative feelings that were expressed would be repeated many more times over the next few months.

**Narrator:** The following are excerpts from the newspaper reporter’s account of the meeting, one that he attends and reports on regularly.

**Gary:** It’s interesting a reporter from the local newspaper had still not approached anyone on staff for their point of view.

**Reporter:** The team teaching approach received the once over, both positively and negatively, at the Grande Yellowhead Regional (School) Division board meeting Feb. 15 at Jubilee Junior High School in Edson.

Four SOAR teachers, a spokesperson for parents concerned about team teaching concept and a spokesperson for Jubilee’s parent advisory council (PAC) all gave their views on the pros and cons of the program.

Joanne Fossheim, representing parents concerned about the team teaching concept repeated the views expressed at a Jan. 31 meeting at the school. The overall message repeated by Fossheim was that parents wanted a choice for students - a choice of a regular classroom setting.
Anita Bruce, president of the Jubilee PAC said it took her by "total surprise" that there were that many concerns about team teaching. "We didn't have parents coming to our council expressing concern." Bruce said PAC members are happy about the team teaching concept but she realized that not all teachers are happy.

Principal Gary Babiuk said the team teaching program was originally started as a way to get to the students who were "floating through junior high". Babiuk said he wanted to dispel some myths and non-truths that he's heard about the program. For instance, said Babiuk, SOAR was not invented just for high achieving students, the program was not taken from somewhere else and team teaching is not "board down" but "teacher up".

Former Jubilee teacher Paul Vandergust suggested a survey be undertaken involving school staff, the general public and students on the team teaching concept. He said this, combined with achievement tests in the fall, would help determine the true mettle of the program. (Edson Leader, February 19, 1996)

**Gary:** After a heated debate among board members, SOAR teachers, the lobby-group representatives, school council president, members of the large audience, and myself a committee was formed. It was charged with investigating the concerns of parents more thoroughly by developing a questionnaire for all parents at the school, thus attempting to include the opinions of all members of the school community.

**Narrator:** Then what?

**Gary:** After the meeting the superintendent passed the following note to the SOAR team and it read, "I was very proud of you. Your professional attitude, interest in children, and your conviction came through strongly. Well done." We then received a letter from the Superintendent on behalf of the board a few days later.

**Super:** At the February 23, 1996 Committee Meeting, the Board discussed the recent events surrounding the team teaching concept at your school. There was strong agreement that the process of dealing with the issues should unfold at the school level involving the staff and school council, but ensuring that all parents have an opportunity to participate. The Board has the utmost confidence in your ability to deal with the issues and it respects your work. It also recognizes that dealing with such issues requires time. The Board sees itself as part of your team and is prepared to help you to whatever extent possible to achieve high levels of student and parent satisfaction.
We know how committed you are to make the students' experience at your school a pleasant one. We applaud you for your dedication and professional commitment. Please let us know if there is any way we can assist you in this process.

Narrator: It seems the Board was behind you.

Gary: This was a nice expression of confidence but the staff and I were starting to feel more isolated and under the gun. We also felt that many of the complaints about large group were in actual fact complaints about the division-wide implementation of the OBE-influenced strategic plan and the inclusion policy, which had been around for 10 years. However, we were determined to find out what the whole school community felt and so we sent out a letter of our own to all parents at Jubilee to find out their opinions. This was separate from the survey we would create by the committee formed at the board meeting.

Narrator: Over the next two months there appeared a number of articles and 'letters to the editor' in the local paper expressing opinions on both sides. Here is an example.

Grade 5 Parent: Let's compare the current situation to something we have all encountered in our lifetime. These parents are like a female dog with pups. You threaten a little and they growl; don't listen to the warning and they will bite. Well, Administrators and School Board Trustees, these parents have growled. Don't listen to their concerns and watch them bite. A few may even turn out to be pit bulls (Edson Leader, March 4, 1996).

Gary: This feeling that parents might “bite” was unexpected and at the school we were again caught off guard, for although each team had parents with complaints, on the whole teachers thought they had dealt with the concerns on a student-by-student basis. But it was becoming clear that there was a lot of resentment out in the community. We were disappointed with parents as we thought we had developed an open rapport with them.

The staff, admin. team, and myself were trying to address some of the complaints that were brought forward by parents who had come into the school and talked to the teams. We attempted to use the experiences of the three teams already into their second and third year to improve our pedagogy. We had started to consolidate and unify our student evaluation system using our Professional Development days to revisit our commitment and understanding of team teaching and OBE.

Narrator: What about the review committee formed at the board meeting and made up of School Council members, lobby group members, a board member, and yourself.
Gary: We convened on February 20 and developed a survey instrument and sent the draft out to others for input so that we could finalize it before we presented it at the next School Council Meeting on March 6th.

At the March 6th Parent Council meeting the review committee was prepared to present a draft questionnaire but the school council meeting was taken over by other members of the lobby group other than those that helped draft the first one. In fact, they had organized about 100 people, not all parents of our school, to attend. They pushed aside the questionnaire produced by the combined committee set up at the board meeting and presented their own survey and voted it as the one to be sent out. The lobby group did not invite suggestions; there was no discussion. They were so well organized that they read from scripts, including members placed in the audience. It was a long and heated meeting, with accusations publicly directed at me and the members of the school council whom, they stated, “Were being controlled by the principal”. This group believed they represented all parents and expected that their survey should be sent out without changes.

Narrator: The newspaper again reported an account of the meeting, another excerpt follows.

Reporter: Anita Bruce, president of the school’s parent’s advisory council, is feeling a little uneasy these days, especially after the latest PAC meeting on March 6 which, at times, dissolved into a shouting match. “I’m not seeing any trust (among parents involved),” said Bruce. “Our council is feeling very mixed up at this point.” She said the agenda item at the meeting was the team teaching survey but parents who turned up at the meeting began to stray off the topic by mentioning other items such as phonics and marking. As a result of the current turmoil over team teaching, the morale of the teachers and students at Jubilee is definitely suffering, said Bruce (Edson Leader, March 11, 1996).

Gary: The fallout from the March 6 meeting was, that two of the parents on the School Council gave their resignation.

Narrator: Other letters to the editor came out in the newspaper after the meeting expressing a wish to have choice, Parents deserve options and We need to work together (Edson Leader, March 11, 1996).
Gary: Although the last article sounds positive, the last sentence again sums up the feeling the lobby group was trying to develop. "Parents have to quit fighting each other and make our school board accountable for the chaos they have created" (Edson Leader, March 11, 1996). Over the next few days I had the teachers from our school, administrators from the central office, the executives of the school council, and board members look over the revised lobby group questionnaire and give me feedback. I also was asked by the board to give a report at their next meeting. I wrote a summary of the events to date, including, a rebuttal of the presentation made by the Lobby Group at the February 15 Board meeting and a summary of the March 6th School Council meeting. I shared a copy of the revised survey letter and instrument that I would be sending out that week in compliance with the Board directive to survey parents. With this information I made some revisions to the lobby group's questionnaire and mailed it out on March 15 to the parents of Grade Seven and Eight students in our school and the parents of the Grade Six classes in the seven feeder elementary schools. The fact that I had altered the survey, developed and voted on by the lobby group, angered them.

Narrator: What did you expect?

Gary: Well the fact that they had themselves circumvented the original group chosen at the February 15 School Board meeting to develop their own letter and survey and railroaded them through at the March 6 School Council meeting didn’t seem to concern them. Their survey and letter was created without any input from outside their group and over the authority of the elected chairperson of the School Council which also didn’t bother them. The changes I made were minor, mostly additions to the summary comparison they had made of a large group and a traditional classroom. I also didn’t send the survey to Grade Nine parents as they were leaving the school and the Grade 5 parents, mostly out of cost consideration.

The response I received included threatening phone calls at home and another letter in the newspaper. Again no face to face discussions, only statements made at public meetings and in the newspaper.

Narrator: Again, what did you expect?

Gary: Well, first the committee that had been originally picked at the Board meeting, which included myself, School Council Executive, and a board member, had been pushed aside

35 The description of the large group classroom and instruction was made without any input from the staff at the school.
for their committee. As well, they had not been at School Council Meeting before and did not understand that the Council is an advisory body. As principal I must make final decisions, with their input. Finally, we had been put on a very short timeline and needed to produce and mail out over 500 surveys in time for people to respond before April 1, 1996. So I made the decision not to contact the lobby group for final ok, as the survey and letter were virtually the same. Maybe a mistake in hindsight but I, too, was becoming defensive and edgy.

At our next school council executive meeting, March 20, the lobby group arrived unannounced. Another shouting match ensued and the lobby group began to accuse all members of the School Council and myself of tampering, as they believed that the changes I had made to the survey were an attempt to influence the results.

Narrator: What about the results?

Gary: On April 1 (the deadline for receiving responses) the committee, formed at the board meeting of equal representation, met at a neutral location (School Board Chambers) to tabulate the results. We spent the evening in group work and, after we were done, the lobby group representatives took copies of the results.

I presented the results at the next School Council Meeting two days later. From approximately a 50% return, the results indicated that at least two thirds of those responding wanted a return to small, traditional classrooms with subject specialist teachers using textbooks, teaching the basics. After the tabulated results were presented, I then promised the parents that traditional, single teacher classrooms would be offered the next fall, thus providing parents’ choice, one of their main demands.

Narrator: Was that the end of the lobby group’s concern? They seem to have got what they wanted, a choice to choose a traditional classroom.

Gary: Well not quite. The other issue, and in fact the one that turned out to be their main concern, was they wished a return to marks, in percentages, for students.

It was as I completed the presentation of the summary of the survey results that the first hand went up. A parent asked, “Will we be getting marks?” and it was only then that I finally realized that the whole exercise and lobby group reaction was primarily based on the demand for the return of marks.
However, the staff and I felt that the issue of moving back to marks was contrary to the school board initiative directed by the Five-Year Strategic Plan to move toward exit outcome indicators. We felt that we needed to proceed with our student assessment as developed. The lobby group was not pleased with this situation. This meeting, again in the library, was a heated affair with verbal attacks against teachers, board policy and other educational issues (such as school bus funding and a modified school year) being argued.

However, after the School Council meeting I was informed by the superintendent that both the Board of Trustees and the Department of Education would not support us in our stand to maintain our student evaluation process and that we would have to provide student marks' to parents. It was a shock to me, as the staff and I had become convinced of the benefit and soundness of using a student outcome focus for evaluating them. We felt betrayed and disappointed that we were being asked to move back to the school structure we had been moving away from, one that we thought was supported by the board of trustees. Our vision of a holistic school program, if not gone, certainly was clouded.

Narrator: So how did you deal with the mark issue?

Gary: It was now nearing the end of April and I had been granted a month leave to move to Toronto to write my Doctoral Comprehensive Exams in May. The next school council meeting would be May 8 and I asked Glen Thiel, the acting principal in my absence, to attend the meeting and present to the parents, our compromise plan, of not only providing a dual program of large group instruction and traditional single classroom, but marked report cards.

Narrator: Again the newspaper provided a report on the meeting.

Gary: It is interesting. Never in my previous six years had we ever had a report in the local newspaper of our school council meeting. Now we had three in a row. I guess controversy sells newspapers.

Reporter: Parents of youngsters entering or already in Jubilee Junior High School will get marks, if requested, and choice of a team teaching or a traditional classroom starting this fall. This was confirmed at the Jubilee Parents Advisory Council meeting May 8. The meeting was a marathon – four hours – and included discussion on many school-related topics.

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36 We had a third program of French Immersion but they were really not part of the whole controversy because the choice for this program occurs early in elementary school.
Many parents wanted to see marks given because they were not totally convinced that the outcomes-based education system of non-marking showed how their youngster was doing and what areas they had to improve in. They also felt the present non-marking system didn’t properly prepare youngsters for post-secondary studies. Others were concerned that the team teaching classroom, with three teachers and 70 students, was not an effective learning tool for the majority of children. They cited noise in the classroom as one of their major concerns. Present at the meeting were Grande Yellowhead Regional Division superintendent Klaus Puhlmann. GYRD director of education, Judy Grigat, and three trustees. Despite being assured they would get marks and that there would be a classroom choice, parents still had some concerns, said Bruce. “They still have a lot of fears.” Some of those concerns, she said include the GYRD’s policy on age appropriateness – advancing a child even if they have failing grades, and drug / alcohol use among some members of the student population. About 75 were present at the meeting (Edson Leader, May 13, 1996.).

Gary: Notice at the end of the article that discussions of other issues outside the large group crept into the meeting. This had been consistent at the lobby group meeting from the beginning. On my return to Edson in June, Glen brought me up to date on the meeting and the activities at the school.

Narrator: So how did the staff react to this five months of intense pressure and public scrutiny?

Gary: It had been very stressful, not only for the staff and myself, but for the students who had spent this time listening to their teachers being attacked by some members of the community. But we continued to work on our project. The Grade Nine students wrote the Provincial Achievement Tests in June and the results would be scrutinized that fall so as a comparison could be made between large group instruction (SOAR) and four traditional single classrooms.

We developed a Jubilee School Enrolment Form so parents could indicate which type of classroom they preferred. We dated them as they were received, in order to deal with the situation where one of the two choices might be over subscribed. The year closed out quietly but the future, in particular next fall, was in doubt. Would we be able to present a dual track school with large and small group instruction, whose programs and organizations are philosophically opposed to each other? Would the community of parents and students divide equally to fill both
tracks? There were a lot of questions that could only be answered when the first day of school began in September.

**Scene Five - Joy - Beginning / Maturity - Ripening**

**Gary:** Thus ended a tumultuous third year. We spent the rest of June and the summer preparing to readjust our teams and slow our impetus away from marks for student assessment. The first step was to create three teams out of five, one large group classroom at each of the three grade levels and ensure that we had enough single rooms to accommodate the single teacher, traditional classrooms, about three per grade. Fortunately, the Maintenance Supervisor agreed to convert four of the eight portable classrooms into a permanent part of our building over the summer. That sure increased the flexibility for timetabling. As well, in one of the large classrooms we erected a temporary divider to create two teaching areas out of one.

**Narrator:** What about the teachers? How were they assigned? What was their reaction?

**Gary:** One of the Grade Eight teams, CALM, remained intact and became the new Grade Nine team. I decided to keep CALM intact as they had the continuity of the first two years. The other Grade Eight team, TEAM, had changed one member each of the first two years and would have to recruit another teacher in its third year as one member was moving back to teach at the elementary level. So I decided to go with the least change. I know the TEAM teachers were disappointed, as Karl, one of the members of TEAM stated.

**Karl:** I liked it. I really liked it. However, I know intellectually that you have to go into that [large group] with people you can work with. I really prefer that type of teaching, and I was disappointed when circumstances dictated it was gone for good (Trans1p. 16).

**Narrator:** How about CALM?

**Gary:** We had a few students move out of the CALM team into the single classrooms and about 14 students from TEAM transfer to CALM.

**Tina:** The TEAM kids blended in pretty well into our CALM team. There were a lot of other kids I guess that wanted to come in, but they were intimidated by the fact that we had been together for two years. They were upset about losing their own team, from what Karl has said (Trans1p. 12).

**Jerry:** And I think we could have had more. I talked to a few of the kids last year who wanted to come into ours but parents said no (Trans1p. 13).
Narrator: What about the Grade Eight team?

Gary: Again I had to make decisions about how to staff the new blended grade eight team. First I talked to the teachers of the ORCA and RIGHT teams. All wanted to continue. So then I had to work at who I thought would be compatible and then check with each of them. I started with Val, who is a strong Math teacher. One of the areas of concern for some of the Lobby Group was Math skills. I also though Val brought a lot of experience from the SOAR years and would be a good leader. In fact, she agreed to be the administrator for the team. I then worked with subject areas and a balance of genders. Glen K. was a Language Arts person and Leona was a Social Studies person. So they agreed and they became the new grade eight team, 8E. Not everyone was happy as others felt that they should be on the team. The first few months were rough as parents moved their children from one classroom to another. We almost had an even split, however. I did have about eight students in Grade Eight on a waiting list to get into a traditional classroom, which was not ideal but was not bad for a major change in programming back to a partial traditional timetable.

Narrator: Here is how Leona and Glen K, members of the new Grade Eight team felt about the changes.

Leona: I must admit the re-action to what we were doing [splitting the team up] was incredibly disappointing because I really do miss them [team members from grade seven]; we had a very good rapport, the three of us. I’m very, very offended when people [parents in Lobby group] blindside me, when people don’t approach me directly about what the problem is (Trans1p. 13).

Gary: Yes, and again it was a tough situation to put them in. These were the students from the Grade 7 year, from which a majority of the parents of the Lobby Group came. Each original team had built a rapport with their previous team members and students and Val had hoped to start a new team. It was an incredibly difficult situation. Some students didn’t fill out the enrolment forms in June and ended up in the 8E classroom by default. Only a few parents came in and asked for a transfer and they were put on the waiting list.

Glen K: We had split things up [the other teams] and we had to become this more or less and I hate to use this term, but I’m sorry, more or less “bottom of the barrel group”. It does work out that way, and for some of them, there was a big problem. When they all walked in there you
could tell, at first, a lot of them felt that way too, that they’ve been kind of left over. It was just negative at first. I think that’s natural, but I think we got over that very quickly (Transl. p. 15-16).

Gary: Finally, the new grade seven team formed itself from two SOAR members, Glen T and Carra and one new staff member, Lisa. This new team did a lot of work to advertise and orient the Grade 6 parents in June. By the start of the school year, enough parents had chosen to put their child in the grade seven large group classroom. This was a miracle in itself after all of the negative press and community rumors of the last year, but still a positive note to begin the fourth year.

Narrator: How was this new team feeling?

Gary: I believe that they were excited to get at it. They had done a good job of showing grade six parents that they were committed to the team teaching, the three-year process, and the education of their students.

Glen T: This time we had kids who generally wanted to be here and whose parents wanted them to be there and it’s wonderful environment (Transl. p 19).

Lisa: Like I remember thinking at the beginning, all those kids are gonna come in the first day, I was just horrified, just scared, and I can’t believe how easy it was (Transl. p.24).

Carra: I think this team, being the second team I’ve been involved with, as much as it’s hard to communicate, we’ve forced ourselves to do that. I think it’s made a big difference for us to communicate what we’re not happy with or what we are happy with. I think down right honesty (Transl. p. 1).

Glen T: I think things were rough through the beginning of the year, because of a number of things. However, I think, right now, we’re starting to reach a certain synergy, like in terms of how we interact with each other.

Gary: Yes, the year was full of challenges and problems as parents, students and teachers had to adjust to a dual track school and the resulting disruptions. But unlike the previous year, each problem was dealt with face to face, and with each individual, not in a large, public meeting. We had to work on our student evaluation program and began to develop a process to accommodate the mandate to return to marks but, at the same time, maintain the gains we had made with the use of portfolios and student-led parent teacher conferences.

Narrator: How did you accommodate the two forms of student evaluation, marks and portfolios?
Gary: Our student assessment procedure became a compromise between results-based assessment that included use of a student portfolio and the traditional marks expressed in percentages on a computer-generated report card. We accomplished this by issuing six different reports per year; three with assessments of skills, knowledge and attitudes outlined in an outcome- or results-based format and three with traditional marks. Over and above the six reports were three rounds of student-led conferences, utilizing portfolios. However, the small classroom teachers were at a disadvantage as parent-teacher interviews and portfolios had to be developed by individual teachers trying to coordinate the process from the isolated position of a separate classroom. The team teachers in the large group instruction could more easily coordinate portfolios and schedules for student-led conferences since they teach together all day and see all students together. Their student assessment is part of the overall integrated planning for all of their 70 students (Babiuk, in press, p. 12-13).

Narrator: What about the differences in educational philosophy and daily activities of the single traditional classroom and the team teaching, large format classroom?

Gary: The challenge over the next three years would be to balance this dual track school with its differing philosophies, without offending the teachers in the small groups. Those who had experienced team teaching knew the benefits of large group and the disadvantages of single, isolated classrooms. They had experiences the support and esprit de corps of the team and it was difficult for them to go back to a single classroom. As well, the school division was still advocating OBE, with a new initiative called MEOM (Making Exit Outcomes Meaningful). It was kind of report card that had been created to outline to parents their child’s process in the student exit outcomes; effective communicator, critical and creative thinker, competent problem solver, collaborative worker and socially responsible student. All this was fine except at the same time, the results of the Provincial Achievement Tests (PATs) were becoming the focus of school education plans and evaluation of a school’s success. These were conflicting messages as we saw it but that seemed to be lost on the Board of Trustees.

Narrator: What about the School District and the provincial Department of Education? What was going on at that level?

Gary: In the political climate of the province the focus was turning to accountability and school-based decision-making. Cuts in budgets, corporate-style downsizing and the belief that provincial wide exams would provide the needed data to determine the success of the education
system were part of this "back to the basics" movement. The return of the factory-style school seemed to be their vision, as if we had ever left it.

Teachers were being mandated by government, boards, administrators, business and corporate executives, communities and parents to improve tests scores by concentrating on the knowledge and skills as outlined in the provincial curriculum. The belief that a student and a school can be evaluated by multiple choice exams, once a year, was disturbing but not surprising.

**Narrator**: Here is an Edmonton paper's report on Ralph Klein's government's view on education. The headline reads, "Readin', writin' 'n' Ralph. Educators must get back to the basics, says Klein".

**Newspaper**: Alberta schools need to start listening to fed up parents and get back to the three R's, says Premier Ralph Klein.

"I would like to see more back to basics," he told The Sun.
That's the result Klein wants from a crackdown on Alberta teachers launched Thursday by Education Minister Halvar Jonson.
"By the end of this school year we’re going to see remarkable changes," Klein vowed. Those changes had better mean a strong emphasis on the essentials, he said.
Helping drive the changes will be the added weight given to individual school councils, said Klein.
The groups will help set standards for what’s taught at their schools.
"The school councils then will be able to say, 'OK, let’s make sure that our kids are educated properly, ’’ the premier said.
"That they get a good well-rounded education of all the fundamental things that are important, arithmetic and history and reading and spelling."
And once the standards are set, teachers will have to make the grade with the councils and the province, said Klein (The Edmonton Sun, September 30, 1995).

**Gary**: At the same time as this exam fever was being created, schools and teachers were also expected to deal with the social issues effecting children from unstable homes, with less parental guidance and influenced by a barrage of commercial messages on all forms of mass media. This increased responsibility for teachers was compounded as provincial social, health, legal, and family support services were also being cut or downsized.

**Narrator**: What about the PAT results for the SOAR team and the other grade nine classrooms of the previous year?

**Gary**: Well, the results came out in November and generally Jubilee’s results were below the provincial average. The process that individual schools were mandated to follow was one of presenting the results to the parents at a School Council meeting, usually after the teachers
had time to analyze them and work out plans for improvement which would become part of the next year School Education and Improvement Plan. Our preliminary observations were that the SOAR students had not done any better or worse than the other grade nine students, except in social studies where they had done better.

Narrator: Not a glowing report?

Gary: No, but certainly not the gloom and doom portrayed by the lobby group. Traditionally the school had not done well in the single subject provincial exams over the five previous years. We felt that it would take a few years to improve the PAT results. But again the marks on these exams are such a narrow gauge of the success of the program. We felt there were other benchmarks such as improved quality of schoolwork, behavior, and the development of a caring classroom community.

Narrator: Any other observations from that year?

Gary: I also saw many instances where parents blamed large group instruction for the behavior or misbehavior of their child. One example was when two parents came in and blamed the 8E classroom environment for their daughter receiving sexually explicit notes from a boy in the class. As it would later be determined it was their daughter that was instigating the notes. But I was becoming more defensive than I had been before; I expected that each parent with a problem was complaining about the large group situation.

Another interesting thing occurred. A reporter from the newspaper made an appointment to interview me about the situation in the new dual track program. I found this surprising, as he had not interviewed me all last year during the lobby group’s attack on the school. Anyway, he came in and asked about how the two sides were doing and I said that we weren’t two sides but one staff trying to implement what the parents had asked and that things were working out fairly well as we had almost an even split in the programs. He left and no article was written. I guess good news doesn’t sell.

So the fourth year ended with another round of Provincial Achievement Tests and a new team outlining their goals for a new set of Grade 6 parents at our orientation meeting in June. We collected the registration forms from the Grade 6 parents and discovered that we did not have enough parents choose the large group format and would not be able to offer a large group program at Grade Seven next year. The teachers, who wished to complete another three-year cycle, were quite disappointed. Added to this setback, was the information that the number of
students in both the Grade Eight and Grade Seven class had dropped to a point that, financially, we could not justify three teachers in a large classroom with less than sixty students.

**Narrator:** So what next, drop the program?

**Gary:** No, but in order to keep the program going, as those parents and students who remained with the large group instruction team were quite adamant about the strength of it, I had to make an administrative decision.

For the Grade 8E team, moving into grade nine, we decided to go with the math and language arts specialists, Val and Glen. Leona decided to take on another project of working with some very difficult and “at risk” students, many from that class. On the Grade 7E team, moving into grade eight, Glen T volunteered to step aside, leaving Lisa and Carra, specialists at Math and Science and Language Arts and Social Studies respectively, to continue.

Many parents were not happy with the drop of one teacher but, again, the funding of our school had become based on student enrolment. That would mean larger classes for the single classroom if we stayed with teams of three teachers, which couldn’t be justified. But at least with two teachers we could continue the project.

**Narrator:** So ended the fourth year. What happened next? It looks as if the project was slowly dying.

**Scene Six – Return to Service / Harvest**

**Gary:** Certainly the staff that had participated in team teaching were disappointed and some were bitter. But we were still hoping to salvage our vision in at least a few small pockets.

The fifth year of the project started with two large group classrooms, at grade eight and nine, with two teachers and 50 or so students in each classroom. We needed to build another partition in one of the large group classrooms to create two traditional classrooms. Across the hall, Larry and Jerry made modifications to the team teaching process. They had recruited a first year teacher, Sheryl, and developed a process called block time-tableing.

**Narrator:** Block timetabling?

**Gary:** What this meant was that these three teachers were assigned the same three grade seven classrooms. They developed their own teaching schedule of the core subjects. However, they taught alone in their single classroom. It was an attempt to maintain the positive aspects of
the team teaching experience, three teachers and the same 75 students. We also planned to have these three teachers follow the students through to Grade Nine.

At the same time the administration team decided that we needed to bring the staff back together. We wanted to heal some of the wounds left over after the effects of the Lobby Group and bring the staff morale back to where it had been at the beginning of the project. We chose to organize a retreat and deal with issues that needed to be brought to the surface and develop a united school team. We worked collaboratively and reviewed our student evaluation process that included progress reports, report cards, portfolios, student-led conferences, and the new MEOM (acronym for Making Exit Outcomes Meaningful) divisional report of students’ progress toward the exit outcomes.

I also completed a comparison of the PAT results. It was a comparison of the last two years of large group instruction, SOAR and CALM with the other grade nines in traditional single classrooms. The results indicated a difference between the single and large group classroom, especially for the CALM team. The CALM group was higher in all four core-subject areas and, in a couple of the subjects; they were at the provincial average or above. However, when I presented the results to the parents at the School Council in the fall, one member of the Lobby group accused us of cheating and coaching the students so they would do better. It’s funny, even when we could show results in the currency that they wanted, that is marks, they still would not change their minds or even enter into a dialogue. They had made up their minds before it all started. I did not pursue it, as I didn’t believe the exam results were as significant as the other indicators of success, such as increase in student responsibility, student leadership, extra help for students experiencing academic difficulties, project learning, and the development of a learning community.

Narrator: We will delve deeper into the subject of comparing the traditional classroom to the large group team teaching situation through the dialogue in Chapter Five. How did the rest of the year turn out?

Gary: I spent the year working at mending fences, trying to bring the two philosophies together. It was a difficult process trying to regenerate positive feelings, especially at the School Council. The chairperson during the Lobby groups attacks, many against her, stuck with it. She was a very dedicated volunteer and, in fact, at the beginning of the next year, had gone to a few of the Lobby group members and asked them to step forward to take on an executive position or
even just attend regularly. Only one did. The leader came forward and joined the executive and attended most meetings. However, after she and her family left town, the next year I could not get any parent to volunteer for the position of president. That was the first time that a parent did not come forward to be president in the eight years I had been a Jubilee. There certainly wasn’t an overwhelming attendance by parents; much of the mood was based on the bitter and angry meetings of the year before. However, by Christmas of 1997, a new group of parents came forward and began to put a positive spin on the work at the school council, including the production of a very positive slide presentation to be used in the orientation of grade six parents. And it seemed that as long as marks were being offered and the school was providing individual traditional classrooms, no one from the Lobby group came forward in any capacity.

Narrator: How about the School Board and the Central Office staff?

Gary: I was asked by one of the trustees, who was quite upset that the large group was no longer offered at Grade Seven, to report to the board. I made my presentation about why the Jubilee project was dying. Most of the board members were relatively new and were not around when the project started. As well, provincial mandates based on changing funding and responsibilities were generally centralizing power at the provincial level and the focus on marks at the Grade Three / Six / Nine / Twelve meant they were not really concerned with the fate of the Jubilee project. They were overworked, and had their own problems to deal with.

Narrator: Anything else?

Gary: During the spring of 1997 a team of teachers and administrators visited our school to observe and discuss the large group process. Later in the month, Glen T and I were invited to speak to their staff at a workshop. As it turned out that school would begin a large group instruction project of their own in the fall of 1998. This was just another indication of the value of what we had been attempting to achieve for the last five years.

As we were preparing for the next school year, setting up another year of block time- tabling, we knew that I was leaving on a deferred leave, in order to return to OISE to complete my doctoral program and write this thesis. We decided to select an acting principal from the staff. Larry and Glen T. were both interviewed and Larry was chosen. As he had been in the CALM team for three years and had worked in the Grade Seven block timetable group, he was interested in continuing the process. For the second year in a row block time tabling was used
because not enough parents chose the large group format for the new grade seven students. As well, no group of teachers came forward to form a team.

**Narrator:** So has the large group project ended? What's happening at Jubilee School?

**Gary:** As I left Edson to move to Toronto to complete my doctoral program one team was left to complete its grade nine year. The staff was continuing to work toward forms of team teaching and authentic evaluation. But it is an uphill battle as there is more and more pressure being applied by the Alberta Learning Ministry [formerly Alberta Education], School Boards and School Councils to concentrate on the PATs and this does not match with the use of portfolios and student-led conferences. Integrated curriculum becomes more of a challenge, as the exams are very fact-orientated and based on a specific curriculum, especially in Social Studies, Science and Math. There is no differentiation between skill levels. All Grade Nine students write the same exam even if they are on a modified program that does not use the same textbooks or curricular materials. Yet, at Grade Ten, students have the choice of a number of levels of subjects that will lead to graduation. As well, the results of the provincial exams are not released until the students have enrolled and started Grade Ten, so the tests are not diagnostic, either. So there are number of challenges for the Staff of Jubilee and only the future will reveal if the staff continues toward the vision of creating a long-term, caring, learning community.

**Narrator:** This brings to a close the telling of one episode of the Jubilee Story. I will continue and expand the story and its influence on the teachers, students, and parents who were involved in large group instruction in the next chapter. The dialogue continues.
Chapter 5 - Narrative Dialogue

Introduction

The previous chapter told the story of the development of large group instruction at Jubilee Junior High School. It is recounted in the words, thoughts and stories of the participants. This chapter will continue the dialogue about their experiences in the voices of the teachers, students, parents, superintendent and board members. I will also be part of the conversation as both principal and participant and researcher and narrator. The principal's voice will speak from the perspective of a participant. The researcher's voice will represent a wider perspective of an outsider to Jubilee School, from the research and literature point of view summarized in Chapter Two. The conversation will center on one broad theme, Relationships, as seen by the participants through the lenses of their three years together in a long-term relationship. The chapter will be based on the interview transcripts of all participants and my observations, as researcher and principal, of the large group classrooms in operation.

As a guiding structure for this conversation, I use the "story model" outlined in Drake et al, 1992 (see Appendix O). The model is divided into three main sections, Old Story, Present Story, and New Story. The Old Story will generally cover the time prior to the start of the Jubilee large group instruction project. This includes the time before I arrived at Jubilee and my first two years as principal there. The Present Story will encompass the duration of the project, about six years. This is a bit confusing, as each team had a three-year cycle and each teacher interviewed had from two to six years of experience (some were involved with two teams). So as one teacher or team had completed their Present Story, others were just starting. Thus as mentioned previously, the stories become intertwined. For the purpose of the thesis, Present Story involves the three years the participants spent as a member of a team in the large group format. The New Story will encompass the time as Jubilee moved from the large group format to block-time tabling and single classroom format.

As Drake et al. (1992) found in her description of how a team of teachers used this story model to develop integrated curriculum, "...it was stories that connected us"(p.1). I believe that the interconnected nature of this model will help unify the dialogue you are about to read. In a way it also connects the participants, even though we are now apart in both time and distance. It is also understood that treating our conversation in the distinct parts of past, present and future is
somewhat artificial; however, as the dialogue unfolds, these segments of time will begin to intertwine and the distinction between them blur as it seems to in most conversations.

I will again utilize the dialogic format outlined in Chapter Four. I believe it provides the feel of a conversation of many voices, which is critical in relating the experiences of the participants in of the Jubilee project. The emphasis on dialogue is necessary to highlight that this is a group story, not of one individual. The conversation is much the same as a group of educators sitting around discussing some aspect of their pedagogy. They express their ideas and feelings in the ongoing conversation, sometimes adding to what someone has already stated or they take the conversation in a new, but related direction. As you listen to the dialogue of the participants (teachers, parents, and students) look for glimpses of how they felt about the changes in their teaching and learning as a result of participation in the long-term large group relationship. I have included the research questions to help guide readers as they listen to the conversation.

**Overall Intention Statement**

I want to discover, with the help of my colleagues, if significantly changing the structure and organization of a junior secondary school will bring about a movement by teachers toward holistic and transformational educational practices.

**Research Questions**

1. How has this new teaching experience changed teachers' educational philosophy about "What's important?"
2. Will students and parents see the changes in the same light as the educators?
3. To what extent can a "reflective culture" be established to replace the "hierarchical educational leader"?
4. How has the movement toward integrated curriculum changed teachers' student assessment techniques?
5. How will the relationships between students, teachers, parents and community change, if at all?
6. What kind of culture or ethos will develop in the school community?

It should be noted that the names of teachers, parents and students have been changed to provide anonymity. This has been done because of the sensitive nature of the topic. As well, the verbatim quotations used in the thesis were obtained in a tape-recorded interview with participants. At that time, I promised that their identity would remain confidential, in keeping with the OISE/UT ethical review. To help distinguish among participants, the following letters
will identify the speaker. Their pseudonym first name will be followed by T for teacher, S for student, and P for parent. The two members of the Board will be identified as Trustee A or B. I use the name Super to identify the superintendent. We begin the conversation discussing what it was like in a traditional junior high classroom at Jubilee School.

**Old Story – Relationships**

**Researcher:** We will first review the Old Story of relationships between teacher / teacher, teacher / student, student / student, and teacher / parent.

**Teacher / Teacher**

**Gary:** The relationships among teachers have always been interesting phenomena. Although teachers have traditionally worked together as a staff team, most of their day is spent in isolation, one adult and 25 students. Most of their teamwork occurs in planning meetings, staff meetings, or during supervision. In department meetings, teachers discuss and plan curriculum, lessons, and student progress but very seldom do they observe each other while they are teaching students. Even a teacher’s internship, first year of teaching, is a sink or swim proposition. It’s truly a survival of the fittest. Thus, once teachers succeed in surviving the first year, they become very independent and territorial about their classroom. Many teachers are uncomfortable having administrators and other professionals observe them.

However, this independence has a cost. For many teachers in junior high school the daily isolation and relatively brief encounters with 150 students a day leads to stress. Very little team-teaching or inter-visitation occurs. Any specific feedback from peers on one’s teaching may occur through videotaping, journals, or in some situations, peer coaching. As teachers, we encourage students to work in teams but very seldom do we consistently model it to them. One other possible downside to having teachers in isolated classrooms is the lack of staff cohesiveness that can result.

**Erma T:** As one teacher stated, some staff members “agree in the staff room and do what they want in their classroom” (TE1p. 11).

**Gary:** So typically, teachers spend much of their non-classroom time in the staff room socializing. Conversations are not usually used to discuss their pedagogy but sometimes students are discussed, but not always in a positive way. Most of this staff-room socialization is important
in maintaining collegiality and helping to reduce stress but does not directly effect classroom or education issues. When I arrived at Jubilee in the summer of 1990, I found a staff which had low morale, substantial yearly turnover but close personal, or collegial relationships. They were very close socially and did a lot of partying. They found this was a way to let off steam and to reduce stress caused by the local situation at the school. As well, it seemed to help recharge their energy levels to meet the challenge of teaching adolescents at the junior high.

Traditionally Junior High Schools have been organized around Subject Departments (Language Arts, Mathematics, Social Studies, Science, Physical Education and Health, Industrial and Fine Arts) and Jubilee was no exception. Typically a teacher was appointed as Head of the Department. This was a voluntary position with no remuneration of any kind. At Jubilee by the time I arrived in the summer of 1990, the Department system was well organized. Departments had developed units and lessons, which they shared. They had a whole bank of exam materials, including a set of Final Exams. The department head also controlled the textbook inventory and schedules for their use had been developed. The mandated Provincial Curriculum guides drove all lessons in each of the subjects. Daily lessons were of the one period variety, with the use of projects, themes and integrated curriculum limited to the individual teacher’s initiative. The organizing of themes, integrated projects and field trips was difficult because of the fragmented nature of the timetable and the difficulty of communicating between isolated teachers in individual classrooms. Teachers tended to do the planning for lessons and units as departments; there was very little communication between departments. Another aspect of project work is the desire to allow students to get into groups and move around into other areas for research, such as the library, computer lab, or out in the community. Because a single teacher can only be in one place at one time, almost all lessons tended to be in the classroom, if for no other reason than more effective classroom management. Any project work that would need time longer than a period would entail coordination with other teachers. Instant changes to schedules were totally out of the question. Accordingly, most lessons tended to be of the lecture style with group work done in the classroom.

Researcher: This situation at Jubilee is certainly consistent with what was described in Chapter Two, the history of traditional junior high schools. They are still prevalent today.
Teacher / Student

Gary: The relationship between junior high students and teachers is not one that is easily described. First, there is the changing nature of adolescents at the physical, emotional, and intellectual level. Add to this that each student and teacher relates to the other in an idiosyncratic way. However, one thing is for sure, adolescents are moving away from being elementary students and are not yet at the high school level. They are isolated in the middle. They are not yet the independent and mature students of high school age but don’t want to be treated as children.

Jubilee is considered a large school37 and perhaps this is one of the reasons why students and their parents were apprehensive about attending. Well-embellished stories about violence and drugs at the school did not help dispel these feelings. Some students, as they moved from class to class every 50 minutes in crowded hallways to see seven different teachers, were indeed intimidated by the pushing and shoving and bumping into each other that goes on in this sea of moving students. Many of these students literally got lost in the shuffle. A few even enjoyed this kind of anonymity, as they could move from class to class, acting out and getting many second chances to misbehave. It was difficult for individual teachers to track a lot of student misbehavior and it ended up that the administration dealt with not only the major discipline problems, such as fighting, vandalism, and skipping class but minor classroom incidents such as talking back, chewing gum, and being late for class. When I first arrived at Jubilee, a large portion of the vice-principal’s and my day was spent dealing with students sent to the office by teachers.

Frank T: You see those kids that period, you don’t see them again till the next day. You didn’t think about, well you were supposed to, but you didn’t, I didn’t think where they were going to in the class after, as another group of 25 students, after a two-minute break, were in front of you ready for a lesson (TF1p. 3).

Gary: It was the same for both teachers and students, a constant parade of unique and isolated lessons. Teachers found it hard to commit to students because not only did they see them for only 50 minutes a day, they were unlikely to teach them the next year as teachers tended to specialize in one or two grades and one or two subjects.

37 Jubilee was the third largest school, behind the two high schools in the two largest communities in the Yellowhead School Division.
Charlie T: The relationship between the staff and students on the whole was not always good. The grade nine students were some of the worse. My experience with grade nines has been their attitude can be devastating, can be totally, totally frustrating (TC1p. 22).

Gary: Part of this type of attitude is that these students wished to have more freedom, control over the decisions about their school life but were not yet willing to take the corresponding responsibility. They, on the whole, were looking forward to moving on to high school and they knew that the school board policy was for no retentions in Grade Nine, so many told me that they would work when they got to the high school, but now was time for some fun.

Heather T: Commitment level was low for me, because I didn’t know the kids last year and that’s something that I really struggled with near the end of the year. You work with kids and want to get to know the kids, but it didn’t happen (TH1p. 8). The same was true if a student transferred classes in the middle of the year. There was no bond built between the teacher and student (GHIp. 32).

Gary: This constant moving of students, six or seven times a day to the sound of a bell, did not allow teachers to get to know students as well as many wished. Then add to this the fact that students changed teachers each of the three years they were at Jubilee. The consistency of expectations and the continuity needed to assist individual students in their growth, both academically and socially, was difficult to achieve. Each September teachers would spend at least the first few weeks getting to know their students and their strengths and weaknesses. This loss of learning and teaching time at the beginning of each year was accepted as part of the process of a junior high school. Students’ junior high school educational programs tended to be three, ten month sessions, with a few weeks at the beginning of each getting to know one another, rather than a three year process (GHIp.8).

Alice T: One other situation occurred that was not ideal. Whenever a new student arrived at your classroom, usually during the day and without warning, you usually were in the middle of a lesson. So you would have to stop and say, “Could you just sit here and at the end of class I’ll get to you” (TA2p 6).

Gary: The poor new student had to sit and try to figure out what was going on in the classroom while you tried to get the other students on to their lesson. Once the class was working on their lesson, you then tried to squeeze some time into the period to get the new student up to
speed while the other students still needed your attention for questions, and usually, some classroom management.

**Behavior and attitude toward school.**

**Researcher:** The following are some of their comments about the daily routine and how it related to the resulting behavior and attitude toward school in a junior high school single teacher classroom.

**Karen T:** One of the difficulties in being alone in a classroom is you can’t leave without setting up an opportunity for things to go wrong. Like, you just don’t leave 25 junior high kids in a room and expect them to behave until you come back (TK1p. 20).

**Jeff T:** As you know if somebody is misbehaving you either deal with them and leave the class or you stand them out in the hall and deal with the class until you can get to them. Or you follow the “yellow brick road”\(^{38}\) if it’s not that serious, but you can’t keep them in the class. It’s [discipline is] hard, it’s really hard in a small class (TJ1p. 4).

**Gary:** Teachers alone with a class of 25 students have difficulty working with a student who needs major disciplinary intervention, so they tend to send the student to the office for an administrator to look after the problem. There tend to be two possible consequences, you give up your power or authority to someone else and the child loses class time, usually for the rest of that period or sometimes even more of the day if the administrators are busy. This inability to leave the room does not for even account for the need for a teacher to take care of natural bodily functions, which don’t always correspond to the 50-minute schedule of the bells.

Also dealing consistently with students and having some continuity from class to class and year to year was a challenge. For example, each teacher had different standards of behavior and quality of work. Some students had a difficult time dealing with these inconsistencies and others used it as a cover for their misbehavior.

**Debbie T:** For each period of a six or seven period day a student could get a number of chances to misbehavior. Teachers can’t track these kids and, thus, there was a chance that a student could go for weeks without the teachers, as a collective group, and parents knowing that a student was not completing assignments to a satisfactory level, not handing in work, and misbehaving (TD2p 1).

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38 The “Yellow Brick Road” was a student discipline program in which students could be sent to another staff member’s class as a form of time out.
Gary: I felt, as principal, as if my office had a giant revolving door with teachers and students, having difficulties with interpersonal relationships, entering and exiting on a continuous basis. There was a glass wall dividing them. Each did what they were supposed to do but kept their distance.

**Student evaluation.**

Gary: Traditionally, junior high school teachers evaluated students through the use of grades or marks gathered from tests, assignments, projects, and classroom work. Teachers also quantified student effort and behavior into a numerical or letter grade. This grade or mark was reported to parents and the student in the form of a report card. At Jubilee, this report card was computer-generated with percentages to the nearest 5%. Also included in the report were the class average, the student’s absences and, finally, two generic one-line comments that teachers picked from a bank of comments inputted by the staff into the computer program.

Laura T: You were doing it [assigning marks] because it was what you did. This is what a teacher does and this is how it’s always been done for me [as a student] and this is how I’m gonna do it. This is how everyone does it (TL1p. 2).

Gary: I, like Laura and most of my colleagues, didn’t really understand what the concept of boiling all of a student’s work into a numerical equivalent really meant. We did it because we didn’t know any better and, usually, no one ever suggested a different way. In the back of our minds we felt that marks weren’t fully doing the job, especially for those students who were not academically gifted but worked hard and were good students. They typically needed more time to complete assignments and learn concepts which many times meant a low mark, or failure, as marks are time driven.

Ike T: Students and some parents also saw the teacher as the “purveyor of bad news” (TI1p 6).

Gary: Yes, as the person who assigned the mark to the student. Some parents could understand that the student earned the mark but, for most, the teacher assigned the mark to the student. Parents believed that a teacher could give a percent or grade and that could evaluate the ability of their child, especially since everyone has gone through the school system and believes they understand what it is to teach and give grades.

Another common frustration was the quality of some students’ work. In many cases students would not hand-in assignments. It usually took you until the first report card to see a
definite pattern. By then, you may have called the parent, but the pattern had been set. If there were a lot of missing assignments, the student's mark would be low as you would have to average zeros for some assignments with others that could have been satisfactory. Also discouraging is the averaging of low term marks into the final year-end mark, so a student can never get away from a bad start or a poor term. In my experience, some students would lose hope by the end of the year and see no use in trying, as a failing grade was the inevitable result of a poor start. As for why they didn't hand in the assignments, well there are probably as many reasons as there are students. For many it was the inability to do the assignment on time the first time. Then, instead of showing this inability by handing in an assignment that was of poor quality, they would try to save face by not handing in the assignment, or they might suggest it was lost in the process. For a teacher, it was difficult to determine which it was, inability or non-compliance, especially since you only were with the student for less than an hour a day for 10 months. As well, there was the dilemma of what to do with late assignments - give them zero, reduced marks, or do nothing because you were glad to have it. Marking was never a clean and definitive process.

Another aspect of student evaluation was what constituted quality work, a good paper or assignment or science lab. For many teachers, getting the "right" answer in an organized and neat manner was considered worthy of high marks. Sometimes you would provide an example but you were always worried students would just copy it. So many students would be unsure of what quality schoolwork was. Across a school staff, the standard of quality would differ as well. This inconsistency of evaluation could lead to confusion and bad feelings as parents and students inevitably compared teachers and courses. Although teaching staffs worked on developing guidelines, from my experience it was difficult to compare as, in the end, we all converted the assignments and tests and our professional judgment of their worth into a single percent or letter grade. And, in the process we inadvertently labeled the student with a grade.

The evaluation by a single subject teacher was usually one-dimensional; it did not take into account other areas of strength or weakness of the student. I saw my student in relation to my subject. If he did poorly or had a negative attitude toward Social Studies, for example, it was easy to assume that he was that way in other subjects. It certainly colored my mind on what the student was like overall.
Finally, how to communicate student achievement to parents? Well, as mentioned before, if I taught in the neighborhood of 150 students each year the chances of getting to know each of them and their parents was a strain on my abilities and time.

**Reporting to parents.**

Gary: Communication to parents on the progress of their student was accomplished in the most efficient way, three or four report cards and two parent / teacher interviews a year. As mentioned earlier, parents readily accepted the report card and they believed that the single grade gave them a barometer reading of the progress of their child. I call it the “Readers’ Digest” version.

A second major method of communicating with parents was through the parent / teacher interviews. Typically parents (over 50% of the time it was only one parent and a vast majority of these were the mothers) would arrive to talk to the teacher. In either scenario, scheduled or open house-style interviews, the discussion centered around the student’s marks, how they were calculated and what assignments were missing. A discussion usually followed about the student’s behaviour and attitude. If difficulties were perceived, the teacher and parent would devise a plan for the student to improve. However, the most important person in the development of the plan was usually not there, the student. Also, many times the conversation went like this, “My daughter says that she handed in all her assignments and that you mark unfairly”. Then the teacher would have to defend and clarify the story or situation. Again the student, the one responsible for the learning and behavior, was not there.

Alice T: As one teacher said, “The parent has only one side of the story” (GABCp. 22).

Heather T: Then on returning home the parent has another one-sided conversation with the student who may or may not deal with the new goals or plans set up by the teacher and parent at the interview. Or, even worse, the child could deny the teacher’s account and a long, drawn out, long distance conversation between the teacher and parent [could] continue throughout the year with the student as courier but little [would be] accomplished except distrust and annoyance, with the student left not being accountable (TH1p. 11).

Gary: Unless the teacher is diligent in contacting the parent during the year, outside of report cards and parent / teacher interviews, students may not be brought to account for their work habits or the difficulties they may be experiencing. This is especially true for the parent who does not bring the student alone or discuss their education with their child. In our busy
world many parents use the report card as a quick method of determining their child's success in school and may not understand or appreciate other aspects of the school life, like attitude toward other students, team work, work habits, and attitudes toward learning. As well, parents who have experienced negative feedback from the school during their child's elementary education may be reluctant to come to the junior high school. Add to this that many adolescents, during these tumultuous years, discourage their parents from getting involved in their school life, unlike the elementary experience. They are expressing a desire to be independent, sometimes driven by peer pressure to break away from the control of family and school authority.

**Researcher:** As the literature indicated the evaluation of student schoolwork in junior high school tended to mirror that of the high school from which it had broken away. It in many cases became a preparation level for the student's time in high school.

**Individualization / Remediation.**

**Researcher:** Another area that effects teacher / student relationships is the ability of the teacher to provide individual assistance. Here are some thoughts.

**Debbie T:** Teachers tended to teacher to the middle. I remember being in a class of thirty and I sort of had to teach to the middle and sort of drag everyone along (TD1p3).

**John T:** Our typical schools had regular classrooms for the "allegedly normal" students and a supplement of a Trainable Mentally Handicapped (TMH) classroom, Severely Learning Disabled (SLD) classroom, along with a pullout resource program and a pullout gifted program. Some incidental sharing would happen here and there in the staff room over coffee, but there was no formal structure in place to share teaching strategies or concerns. The school was an "egg carton", complete with its hallways to isolated cells called classrooms (Martini, 1994, p. 18-19).

**Gary:** A similar history of these types of classrooms occurred at Jubilee. In fact, I have seen these "special" education or resource room kind of initiatives throughout my junior high career, in a number of schools. A current example is the IOP39 classroom for students whose academic abilities are at least two grades behind their peers. This program was an attempt by teachers to deal with discrepancies among students' abilities. In many schools it backfired because the students were either labeled as "dumb" by other peers and teachers or the class was populated by students with behavior problems, so in fact the class became a holding tank. However, in Yellowhead School Division this was changed.

39 Integrated Occupational Program.
John T: The superintendent of schools announced via memo in the spring of 1987 that the entire school division would become involved in an educational direction known at that time as "integration". More specifically, all children who heretofore had been sequestered in a special educational setting apart from the mainstream would in essence join the mainstream (Martini, 1994, p. 17).

Gary: This new inclusive policy did not alleviate the dilemma that teachers had to deal with as the result of students arriving at the junior high level with academic abilities ranging from pre-school to high school. Individual teachers in their classroom found that because of the short, fragmented classes, it was hard to individualize lessons for the numerous levels of student abilities found in their classrooms. It seemed that once they started to get a handle on an individual student, the year was over and the student passed on to a new teacher in the next grade and the process of discovering the abilities started again. It wasn't as if the previous teacher didn't communicate to the receiving teacher, but with over 150 students (six classes of 25 students) seen each year, the necessary details and time to complete this process were limited.

Because of the wide range of reading abilities it was difficult to individualize. As you were by yourself in one classroom, sending small groups of students out of the room to work was not always acceptable, especially if the students were not willing to stay on task, and besides, they also would need guidance from a teacher. Add to this the short span of a lesson on a daily basis, 40 to 55 minutes (a typical range of period lengths) and the ability of the teacher to assist all students, especially if there were a great number of needy students, was hindered. It was usually a frustrating experience not only for the teacher but also for the students themselves as they felt they weren't getting the individual attention they needed.

Researcher: Thus we get a picture of the "typical" junior high school, at least the Jubilee version. Here is an account of this style of school described in the Task Forces' report, Turning Point (1989):

Consider what is asked of these students: Every 50 minutes, perhaps 6 to 7 times each day, assemble with 30 or so of your peers, each time in a different group, sit silently in a chair in neat, frozen rows, and try to catch hold of knowledge as it whizzes by you in the words of an adult you met only at the beginning of this school year. The subject of one class has nothing to do with the subject of the next class. If a concept is confusing, don't ask for help, there isn't time to explain. If something interests you deeply, don't stop to think about it, there's too much to cover. If your feelings of awkwardness about your rapid growth make it difficult
to concentrate, keep your concerns to yourself. And don’t dare help or even talk to your fellow students in class; that may be considered cheating. (p.37)

**Student / Student**

**Researcher:** What about the relationships among students?

**Gary:** Student to student relationships were strained, as they felt apprehensive about this new and larger school. The organization of the schools in the community added to their feelings of isolation. Students arrived from seven separate elementary schools of different sizes. Four are located in Edson and three in outlying communities, where these students have taken all their elementary schooling.

This mixing of social groups (seven different schools) resulted in a tumultuous first year. Each group had its own social order and share of bullies and leaders and all students had to find their place in the “new” Jubilee social order. Their status could change from being the leader at their former school to being at the bottom of the social order at Jubilee School. Grade Seven students no longer had younger students (K to 6) to model for. Many looked around and saw Grade Nine students as a model for their behavior, not always the best role models. Grade Nine students did not always take on the leadership roles that we hoped they would. In fact many were negative role models as they rebelled against any form of authority.

**Teacher / Parent**

**Researcher:** This relationship was very traditional. Parents expected teachers to be in control of students and “get them to learn”. Most parents saw the responsibility for learning resting with the teacher, not the student. They wanted marks from the teachers as barometers of their child’s progress, or lack of it. The relationship was formal and distant in most cases.

**Gary:** This relationship was very similar to that of the students but even more distant, because there was even less personal contact. First of all, most Grade Seven parents were new to Jubilee School and sometimes reluctant to visit. They also had just spent six years in elementary school being intimately involved with their child’s education. They would go to the classroom to help the teacher, they would help fund raise for playground equipment, go on field trips to the farm or fire-hall, and they would attend the ultimate of events for an elementary school, the Christmas concert. Now students were entering a place that had a dark history, and parents were hesitant to send their “baby” to this shady and reportedly dangerous place. At the same time their
“baby” was asking them not to come to school, especially the dances, as their friends might see them and think they weren’t independent “junior” high students. Thus, not only did the participation of parents in school activity drop off in Jubilee, but parent/teacher interviews saw about a 33% attendance rate for parents.

**Bud T:** In the old way [traditional] the parents that you saw were the parents of the students that you didn’t really need to see, because they were doing well. The odd time you would see a parent of a kid who was in trouble (TB1p. 15).

**Gary:** Generally parents were satisfied with Jubilee. Very few parents attended School Council meetings and even fewer expressed dissatisfaction. Most dissatisfaction was expressed in conversations outside the school and passed on as hearsay. About 10% of the parents had children who were at risk of not staying in school for reasons of drug use, skipping school, violent behavior or running away from home (all these behaviors were influenced by family problems). Most of them felt that the incompetence of the staff at Jubilee had created their child’s problems. These are the parents that the administration generally had to deal with, and this was complicated as neither the vice-principal nor I taught these students, yet we ended up being the mediators for parent, student and teacher. As well, in order to discuss school-related problems it was necessary to gather together seven teachers, an administrator, parent and student for a meeting. This is not an easy task and one that typically had to occur before or after school as you could not take teachers out of their classroom during the day. This was inconvenient for some parents and didn’t allow for much flexibility.

**Heather T:** I tried to contact the absentee parents by phone with the following results. I phoned this one Mom and I didn’t expect the response I got. “My kid is just being picked on and I’m gonna come down to the school there and I’m going to give you a piece of my mind.” I think she got phoned a lot (TH1p. 28).

**Gary:** Heather’s example is typical of my experience with parents of students in difficulty. Many teachers who had been at the school and lived in Edson for awhile knew some of the families. In fact, a few teachers had taught the parents of the current students. But again it was difficult to develop close and trusting relationships, as each parent had to deal with at least seven teachers, usually more as students changed option courses at least three times a year. As well, teachers changed each year. It was difficult to create a committed relationship between teachers, students, and parents in this fragmented “junior” high school.
Many parents and community members saw the misbehavior of Jubilee students in the community and around the school, especially before classes, noon hour and after school. They felt this was a Jubilee problem, not one to be solved by a parental and community partnership.

**Researcher:** The previous conversation outlined the relationship issues being dealt with at Jubilee Junior High School leading up to start of the large group instruction project. It was meant to provide the background, the Old Story, before the participants discuss their experiences in the three-year cycle of the large group, the Present Story.

**Present Story – Relationships**

**Researcher:** The following is a continuation of the conversation about how the three years together in a large group classroom effected and changed relationships from the point of view of educators, students and parents. Readers are encouraged to look for changes in attitudes and behaviour in all participants from those described in the Old Story. Were the experiences the same for each group of participants? What kind of culture developed as a result of the structural changes?

**Teacher / Teacher**

**Researcher:** The teachers involved in the team teaching, long-term, large group classroom indicated that the three year relationship had been the most powerful professional learning they had experienced. It seemed to be the fuel that made the large group hum. It was the catalyst for many positive events in the large group project. Here are their ideas.

**Learning from each other (Learning Organization).**

Charlie T: I think that there have been some profound changes in my teammates. One in particular because she is a very “gung ho” teacher, always a very competent lady, ready to jump in, but she has learned to modify certain skills, professional teaching strategies and skills because of the logistics of the room and the individuals involved. In the Grade Nine year this is something quite unique, I think perhaps its the first time she’s taught at that level, so that’s an experience for her. My other partner was very comfortable in the teaching strategies and style that he used, but now I think he’s being forced to understand that kids learn differently because first of all they have to want to learn, and they have to get involved at some level with the individual [student], too. I think he’s appreciating that a little more and seeing his impact, and
especially, the exposure to different subject areas and things like that. I think it has been a positive experience overall (TC1p. 23-24).

Ike T: It has changed my philosophy in terms of the need for teachers to work together and what that really means, the difference between the department team, such as social department and math, and a team where people actually worked together. So in that respect, I would have to say that is probably one of the biggest aspects of my philosophy that has changed (TI1p. 1).

Gwen T: Working with three other people in a group and now with two other people forces me to be reflective whether [I] really want to be or not. [I] are forced to be reflective because [I] have to interact with other people and it’s not a closed-door policy. Whereas, maybe before [in single classroom] it would have been a lot easier for me to say, “Oh I must be OK and my door is shut and I’m fine and I don’t have kids crashing through them making noise. I must be doing a good thing”, now I’m forced to look at those little things. That has changed (TG1p. 4).

Alice T: Teaching with my teammates has been a lot of fun, watching their teaching styles. It’s very interesting just to see how they do things, and present things. You’ve had lots of teachers teach you throughout your education and then you go to university and you learn how you’re supposed to do this, supposed to do that. You go through your student teaching and I didn’t have a chance to watch often. So I didn’t get a chance to watch a lot of people teach. I mean, you know, when you’re a kid you don’t evaluate them [teachers] that way. You feel you have good teachers, bad teachers, but you don’t really consciously sit down and evaluate why you like them. I would have liked to have watched more in my first years. ... You kept saying, “You should utilize inter-visitations,” but it always seemed you didn’t have enough time, you had to do sub-plans and everything. But having them [large group team members] make comments, and me be able to watch them, I find that has been the biggest plus (TA1p. 21-22).

Ike T: “I don’t like it when you do that. I don’t like it when.” “Ok I guess I’d better change that.” As long as you take it as professional criticism and do not take it personally then, of course, you’re able to use that to better your own teaching practices and become a better practitioner (TI1p. 14).

Debbie T: It’s an experience, it’s an opportunity to grow professionally, individually. To work with other adults, I mean, in a natural team situation. I am very pigheaded and independent
and it's been very good for me as a person, not just as a teacher, to be able to compromise and to work through situations (TDlp. 12).

**Charlie T:** We worked at something and we felt comfortable with it. If it didn’t work we didn’t feel negative about it; because when we instituted it or initiated it we felt it was a good procedure or practice to follow. So it was very instructional in that manner. It has been a real learning experience, I mean, there’s just no doubt about it. If learning is a life long experience, then obviously we jumped right in... (TC1p. 20-21).

**Erma T:** Well, in our group I really enjoyed working with my teammates. I saw talent that I never would have known if I hadn’t been in the same room with her. I like the way that she presents and I like the way she deals with kids. I really though that was good. And another team member’s growth was another thing that you don’t often get a chance to see (TE1p. 11-12).

**Researcher:** As Senge (1995) stated, the only real learning that occurs in an organization is team learning. This certainly was the feeling of all the teachers who participated in large group instruction, “an incredible professional development opportunity” that happened every day. The literature around team teaching certainly identifies this advantage. Specific examples include peer supervision (Appendix C12) 40, decision making opportunities (C12), problem-solving and real collaboration (D11), risk-taking (D13), and improved communication (D14) The long term relationship literature also outlined advantages to teachers working closely together, such as loyalty and higher levels of tolerance and cooperation (E11), as well as developing a learning culture (E17).

**Moral support.**

**Researcher:** Along with learning from each other, teams of teachers provided support to each other.

**Debbie T:** You know, the most rewarding thing has been working with other adults, working with other people in the classroom. Not just for the moral support, but last year we had a lot of fun. We fed off each other and it was very enjoyable (TDlp. 11).

It can be very supportive, actually. It’s nice to know sometimes when you’re having an especially bad day with a particular group of students, or a few, that it’s not you. You may be responding badly to their actions, they are being brats, so it’s nice, the support is good. And it’s

40 The letter indicates the Appendix and the number corresponds to the advantage or disadvantage listed.
easy to fall into that trap [reacting to students negatively] when you’re in a classroom by yourself (GDEFp. 12).

Erma T: We didn’t have a lot of down time. I do think, usually when one of us was down, the other two weren’t. We usually had enough power in the group to keep everyone focused (TE1p. 18).

Frank T: [We were] accountable to our colleagues. You can’t just say, “Oh great, my teammates teaching; now I can go take a period off.” It doesn’t work that way. You can’t leave somebody in the room with that many kids. You can’t just say, “I’m going to have a bad day” or “I think we’re gonna change plans and ‘wing it’ and do something that’s totally outrageous”. This is gonna screw up the next two periods. You don’t because it’s not your class by yourself (TF1p. 2-3).

Gwen T: I’m comfortable with how I do things, but I’m very controlling and I can take the ball and run with it on my own. I can handle it all myself and I don’t need any help and I don’t need anyone. I’m gonna have everything laid out just like this. So that was a big surprise to know that I really need the people that I work with. And I do like them and sometimes now I think, it’s a real sick dependence because I don’t know if I could, go back to teaching in a small classroom but, I don’t think I’d want to. That’s a big surprise to feel dependent on two other professionals as much as I think I do. And I think that’s ok. It’s a real interdependence (TG1p. 16).

Heather T: I think that all three of us have been in the position where we feel it has drained us. It happened the odd time. But I think, more often than not, we really balance each other out (GGH1p. 4).

Alice T: I really like it, I was a little concerned at first because I consider myself a very independent person. I don’t like to tell people why I’m doing something; I just want to do it. I haven’t found a problem with it, in fact, the thought of not teaching in a team next year is really almost daunting (GABCp. 6-7).

Bud T: It is less stressful than when I taught in the traditional classroom. Once again my teammate said that we’ve always helped each other out. It’s better with three minds. And even in your subject area there is always a little critical help. I find it a whole lot less stressful than how I used to teach [single classroom] (GABCp .7).
Jeff T: Just knowing that you’re not on your own anymore. The decisions have to be a group decision and you’re part of a team. You’re a team worker now and you don’t just go do this. You go to your partner and say, “What do you think?” We had to do that. If you got a problem, hell, you have two guys with a shoulder to lean on. You’re not like we are right now [back into a single classroom], all on our own, you deal with your own problems (TJ1p. 8-9).

Researcher: One of the most serious problems teachers in general are currently dealing with is stress, or “burn out”. Team teaching really seemed to help teachers deal with some of the stress and revitalized their interest in their career. But key to this feeling of support was effective and honest communication.

Open communication.

Ike T: With this group there’s a lot more personal contact, a lot more airing of disappointments, as well as successes. There’s a lot more delving into, who we are and why we’re the way we are as individuals. And as a result we get to know each other, not only as colleagues, as teachers who work together in a classroom, but as human beings, as people who have personalities and quirks and flaws and wonderful aspects. And in doing so you can begin to understand someone else and maybe not be so professionally critical of things that they do, because you understand them as a person. And so it doesn’t mean that you can’t help each other improve professionally. You can always be a better practitioner, but what it might do is lead you to understand why some things are occurring. And it maybe even develop a greater understanding of how to help that person change, if that’s what they choose to do (T11p. 22-23).

Gwen T: I think the most difficult aspect of this is trying to get past the, I wouldn’t even say personality conflicts, being pleasant, getting past the pleasantries and working as a team. We all get along and this is really fluffy and great, but let’s be a team and we’re starting to be able to say, “Hey look, this isn’t working, let’s talk about why” and not turn it into something personal. It’s getting to really work as a team, not just working together, but working in the same room, working as a team and that’s been the toughest. And in the same respect, that’s what’s the most rewarding, too. I mean they go hand in hand, because I get to work with two other people who I have not only the utmost respect for, but also I enjoy them. When the three of us get together we have great ideas. We can say, “Hey look, I just had the “shittiest” day of my life and I feel like crap”. And you can be mad or you can cry or you can be upset or you can discuss it and debrief and feel better about it. To be able to sit and reflect and they know what you’re talking about,
they were there. They know exactly when you say, "Hey look that kid drove me nuts. I can't deal with that kid. I can't, I'm gonna kill them." And they reply, "Hey well you know, look I can handle that kid, but you know this kid drives me crazy". And so that's the most rewarding, its re-affirming that, hey, I'm OK and I'm doing pretty good in this profession but, I got these two things to work on. Working on a team is toughest, but the most rewarding for me (TGp. 10-11).

Heather T: And as much as it's really uncomfortable to talk about how you feel and how you're dealing professionally, and to remove yourself, I think we've actually been able to say, "Look, I'm not very happy when this or I don't like it when you," and not make it a personal attack.

Debbie T: It is very important that the members of the team communicate and sometimes because teachers tend to be individuals, sort of doing their own thing, communication sometimes falls by the wayside without even thinking about it. It takes some work to communicate with your colleagues and to make sure that everyone knows what's going on at such and such a time. And sometimes we all just take it for granted that the others know what's happening until, "Opps, sorry. Oh didn't I tell you?" (TD1p. 9-10).

Jeff T: Oh, everyone before [single classroom] was just a little entity. Everyone was a little group, just a little person. Shut your door, do your own thing. When we get in a group, you have to cooperate; you have to, right? (TJ1p. 16).

Heather T: I think it will be hard going back to just being by yourself. Because when you're with the same kids every day and you see the same things and you see the same problems, and so at the end of the day you can talk about it and say, "What's going on? Is it something we're doing? What can we do for this kid?" There is a lot of communication that goes on that is very supportive and I think a person would feel much more isolated being by yourself (TH2p. 4).

Gary: I've thought about this a lot. Some critics of the large group told me, "Oh yeah, Ok, so you had this good team teaching relationship in large group. Well, just duplicate that in a single classroom". The fact is you can't find a substitute for a three-year team teaching relationship. Here is my analogy: what happens over three years with two or three teachers in a [large group] room is, they develop the relationship and the ongoing conversation in little snippets, little conversations, that occur within a minute, or 30 seconds, over and over during the
day. It's like a long-distance relationship [between partners]. You cannot pack three months of living in a long weekend with someone. It just doesn't work. How does that type of close relationship develop? It has to occur over extended periods of time, little conversations, not one big long conversation. So then they [critics] say, "Hold it now, why not have the teachers meet once a day?" In that type of situation the individual teachers would sit down and say, "Ok here's what happened", but I have to explain and describe my observations and I don't remember them all. There are no continuities, no common observations. As a team together for three years you observe what happens and you deal with it immediately, as you go along throughout the day. And that's what you can't duplicate, the common classroom experience. Then the critics say, "Well, that doesn't matter." I think it does, because all of the other advantages that come about in the large group classroom, such as better knowledge of student abilities and skills, consistency of expectations, integrated curriculum, etc., are built on that little thing, the building of relationships based on common experience over time (TH3p. 2).

**Risk taking.**

Researcher: The open communication, moral support, and learning from each other seems to provide a safe environment in which teachers could be confident and comfortable and resulted in team members taking risks.

**Frank T:** With colleagues, you have to be comfortable working with them. You have to be able to be wrong with the kids, with colleagues; you have to feel comfortable correcting and being corrected in front of the whole room (TFp. 23).

**Alice T:** At the beginning I think he was a little ill at ease with two other people in the classroom. [My teammate] definitely became more at ease and now he likes to take part, like today I was doing the newspaper unit with the girls and a teammate had the boys. He has no problem now jumping in and saying something about whatever's being talked about (TA1p. 44).

**Ike T:** I think we're starting to become more comfortable in interjecting with each other at various times and I notice it's going on through the course of the year with Social Studies and a few other times. I think we'll get better at it (GGH1p. 3).

**Charlie T:** If you look at the group that we've established, to a large extent we're very open, outgoing people. I think, therefore, to some extent we maybe risk a certain amount of comfort, but on the other hand I think because we are open the kids have seen us and can
understand that it's not pretentious or a production, there's not a falseness there. It's sort of straight and on the level that way (TC1p. 16).

Frank T: If my teammate makes a mistake in Social Studies in taking notes off the overhead and you know the answer you have to be comfortable correcting her and she has to be comfortable in living with that (TF1p. 24).

Alice T: Math has always been my "Achilles heel", and so I've really found this [team teaching] really great, because I see it [Math being taught], I see other subjects. So I know how the kids are feeling, too, because I was that kid who sat there going, "I don't have a clue what he's talking about, I don't understand it," and getting really frustrated and I just gave up eventually. So, it was last week a teammate had gone through some Algebra and he had gone through quite a few examples. I didn't get it and I looked around, looking at the students who looked puzzled. I interrupted and I asked them, "How many of you really don't get this? How many of you are sitting here and thinking I don't have a clue what he's talking about, but your not going to ask your just going to sit there?" And then I talked about the fact that it's not stupid to not know the answer, but it is stupid to sit there when you don't know and don't ask. Half the class put up their hands up, which I thought was interesting. My teammates have done that for me too, and said, "How many of you really don't get this" or whatever. So it does make you focus more clearly (TA1p. 4-5).

Bud T: That's the same with me and that's the part I find enjoyable is just teaching something different. Right now I'm working on a newspaper unit which is current events. It's a project they're doing. They have to put together their own newspaper and I'm doing it with the boys. I've never done anything like it and I'm really enjoying it and I've done it for the last three days and the kids are getting along and starting to say to themselves, "He can do something other than teach PhysEd and Math". This works and I find that enjoyable (TB1p. 7).

Modeling team work.

Researcher: One current student outcome asked of public education is that schools teach teamwork and cooperation. In the large group classroom this is modeled on a daily basis. Students actually see a team of teachers working.

Frank T: I think they see that. We're not even doing that purposely, but obviously they see that (GDEFp. 35).
Researcher: The students in traditional classrooms observe individual professionals working by themselves. They’re not seeing on a day-to-day, minute-by-minute basis, three people working together.

Erma T: Sometimes they see us huddle at the front right when we want to change something or fit something in or what ever, “Can I have 20 minutes and can we do[something else]?” They see that and they see that everyone puts in a couple of sentences and the decision is made and everyone walks away and that’s what happens (GDEFp. 36).

Frank T: We all get to have input. A lot of times [in single classroom] you’re stuck in situations with no time to make those dead-on decisions just like that. Now we don’t necessarily have to do that (GDEFp. 35-36).

Debbie T: And the other thing is that I’m really aware that we are modeling certain behaviors to the students [such things as], how teams work, how decisions are made, coming to consensus. It’s nice that the students can see us. They see people on the staff are colleagues and I don’t think they see the staff as a fragmented thing. I think they see the people working together, communicating, and working in a common direction. I think it is very positive for the kids to see (TD1p. 11).

Gwen T: We know what makes a good day working as a team and what makes for a bad day and what can be a positive thing for the kids. When we’re all really a part of what’s happening, both emotionally and intellectually, it’s much better not only for us but for the kids. They really enjoy it when they see the three of us involved actively in what we’re doing. It makes a big difference (GGHIp. 2).

Researcher: The teacher – teacher relationship really was an important part of the large group classroom. It was a combination of all of the factors; learning from each other, open communication, and moral support that created a safe and caring “learning” environment. I also think teachers feel good about their work and thus their work mates. They felt they were doing a good job and had some control over that and this in turn provided a confidence to take risks. Students also feel the positive effects of teamwork in action in front of them. The research on team teaching confirms this finding that relationships between team members are enhanced. There is a reduced feeling of isolation (Appendix D8), higher morale (C16 and D15) and close bonding (D27). The long-term relationship research also indicates an increased willingness to try innovations (Appendix E11).
Teacher / Student

Researcher: Looking over all of the transcripts from teachers, students and parents, the improved relationship that developed between the student and teacher seems to be the most critical outcome of the three-year, large group project. The continuity of three years together allowed for the development of an in-depth knowledge of the students and the ability to know students wholly as individuals. The same can be said for the students of the teachers. For the teachers, this intimate knowledge translated into better individualization, remediation, and evaluation of students. As they came to know each other a commitment, or bonding, occurred which seemed to result in students taking responsibility for their actions and having improved behavior and attitudes toward school. A safe and caring community developed. The following dialogue extends this observation.

In-depth knowledge / Continuity / Know student individually / Wholly.

Researcher: One of the most discussed advantages to having students together in a large group classroom for three years was the ability to know students very well and see them in all learning situations. Parents felt that the team of teachers knew their child better than previous individual teachers and the teams were better able to take action to change the students’ programs.

Alice T: I can tell if someone’s really upset. To most of them I can say, “You seem to be having a bad day, what’s going on? Do you want to talk about it, do you want to talk to a counselor, or me?” Where as before, being by yourself, they’re your kids but you don’t know them as well. And also even if you did, do you really have time to? Maybe when you get them started you could take one [student] out in the hall and talk to them [him or her], but you really don’t, you know I can’t. I couldn’t go up to my teammates [when I was in a single classroom] like I can now and say “I need to take so and so to the office and talk to them, I’ll be back.” (TA1p. 22).

Gwen T: I guess I’ve acknowledged that kids [today]come to school with a lot more baggage. I’ve always known that, that behavior is based on what is happening in their life experiences. They come in this building and because I get to know them, and I think I know my kids better than I would in a small classroom, I know when they have had a crappy day at home
or that something has occurred just by their behavior, their outburst. You know even the good things that are happening at home (TG1p. 5).

**Debbie T:** I like seeing the kids all day. Some of them I don’t like seeing all day, on a bad day but, overall, I don’t have a problem with it. I enjoy seeing the same faces all day, because they know that if they fool around period one and they’ve had their two or three warnings, it’s not going to happen period two. It’s just not because they know they’ll be out the door and working in a common area by themselves. The continuity is very, very satisfying in terms of classroom management (TD1p. 19).

**Heather T:** I think the kids I have now, they’re just neat. They relate to you so well. You always have kids that want to tell you everything that’s going on in their life. I always go up there [classroom] ten minutes before the bell so the kids, they talk to you. They talk to you and I never had that happen last year [in single classroom]. Well, they talk to you in the hall but these kids are interested in you. They’re interested in sharing their life with you. Even during all the breaks, you know, they don’t move, they stay in, they talk to you, so I think they are tied in to us in relationships. There are lots of kids that do that (TH1p. 27).

**Charlie T:** I think I tend to now make an attempt to spend time with individual students and see how they perceive an assignment or an activity, as opposed to when I used to teach [single classroom]. It was much more of getting, interacting, and then determining the understanding based on sort of the group understanding. Now I tend to find the time spent with the individuals over three years has developed more of a personal relationship and [I] do perceive that [I] know kids who are going to be able to pick up on certain abstract concepts, and [I] know who is not. [I] know the kids who are capable and for whatever reasons able to and so you may be able to interact with them at a certain level, have a nice, interesting conversation or be able to extend their understanding. Whereas [I] won’t do that with all of them and [I] may not have had the chance to do that with any of them [in the individual classroom]. So I guess that’s sort of a major focus. I had more of an opportunity to deal with their intellectual abilities, on an individual basis.

**Heather T:** Just because I see them every day and I know these kids a lot better. I really know what these kids need, a lot of them, especially in Math or in other subjects that I don’t teach. When I’m not teaching science, you see them struggle in Language Arts. I see them struggling in Math and I know these kids really well, what kids need more attention and more
help than other kids do. I have way more understanding of things that are going on at home. But the thing is, too, being in a large group allows you to identify that a lot better, on a consistent basis. I’m only thinking because in a small group, I don’t even know if I actually knew the kids (TH1p. 4-5).

Debbie T: We’re doing the best we can in getting them into alternate programs or alternate situations to help them succeed. So that sort of developed as the months progressed because we could see what was cropping up. We could see the issues (TD1p. 17).

Ike T: I often felt [in a single classroom] that I wasn’t able to do the job that I wanted to do with kids who didn’t possess some of the skills or maybe just needed a little bit of extra help or time, because 50 minutes later a new batch came in and [I] had to do the same thing with them. So in that respect [in large group], I think my understanding of them is improved and I think, also, as a result of that I’m able to do more with them, and that they all learn differently. There is not one set process for kids to learn. Again, as a result of the program, we’ve been able to develop a lot of things that individualize some programs. For example, a student who’s in our class, wasn’t handing in her assignments. She couldn’t explain why she wasn’t handing them in. We put a box on the calendar beside her desk and now she hands in her assignments. She just puts them in this basket and they come in. So, I mean, if something that simple can induce a student to further his or her own learning, hey, it’s a simple thing. In my traditional classroom there’s no way I would have had a chance to even discover that because now we see them all day long (TI1p. 5).

Alice T: I’ve been exposed to watching them do L.A. [Language Arts], Social Studies, Math, Science, PhysEd [Physical Education], I mean I have just been exposed to a much wider audience type thing. Whereas before [I] know they came in for L.A. or they came for Social Studies and that’s all, and it didn’t really concern me about Math or Science. I mean it didn’t concern me at all, it didn’t have anything to do with me. You know, I would make sure I didn’t give a test on the same day but, other than that, what does it matter? So, it’s interesting how you have to focus them, like when you’re teaching Math, you have to focus them in a different direction than if your sitting down and explaining a story to them or a concept of Social Studies. And I have to think in a different way too, when I do that, which has helped me a lot.
I don’t know if it’s what I’ve learned in the big group or just from the fact I know these students so much better than I’ve ever known any other group, and that to me is the biggest plus of this whole thing (TAlp. 14-15).

**Karen T:** I think you see their strengths. Like, for example, you have a Math / Science type student, and you’re the LA / Social teacher, you never see them at their strength. T. C. is a perfect example, strong learner in Math / Science and fights with L.A., horrible writer. All of a sudden you see them being successful and very good in the Math / Science area. I think it kind of makes you think, “how can I approach this kid in another way?” (TKlp. 5).

**Researcher:** Students and parents provided observations of teachers’ ability to know students’ strengths and weaknesses.

**Betty S:** She was just a real good teacher, who found ways to make students know what they’re doing, whether it was fractions with pies or using cubes. She knew what you needed (SBp. 2).

**Carol P:** I think with my son I’ve noticed he is one of those kids, I know for sure from Grade 1 to 6, that slipped through the cracks. He didn’t learn and no one noticed he wasn’t learning. I found through this pod learning that he has been picked-up. It’s been picked-up that he doesn’t do his work if someone doesn’t watch him. I think it’s made a big difference. I’m almost scared to think where he’d be if he was allowed to just coast where he wants to coast. So, as an issue maybe focusing in on each individual, even though it’s a big classroom, each individual child is still an individual with different learning levels. They’re actually learning (PCp. 1).

**Edith P:** I don’t care if they’re in a classroom with 25 kids or 80 kids, this program does empower them and it also gives them more personal support than they would have with one instructor (PEp. 6).

**Hank S:** I think they really got to know the students better than... like, they really got to know them really well and, after the two years or three years, students got to know the teachers really well (SHp. 3).

**Researcher:** Students also got to know teachers better over the three years together.

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41 Nickname [pseudonym] of a student.
42 Another name used to identify a large group instruction classroom.
Ann P: Oh yes, that’s one of the neatest things, too, that the students get to know the teachers. The teachers know exactly where they are when they come in the next year. I sure know where my daughter is or I know where my son is. It is absolutely part of building a strong relationship and helping the child. That’s an important component of that whole way of teaching, I believe.

Fern P: Right, she herself says, “You know, we really get to know the teachers well.” Where as even in Eastport⁴³, by the time you get to grade six, you have met a lot of different teachers even though it’s at an elementary school, your music, PE, math, science, can all be taught by a different teachers. I definitely heard the teachers [at Jubilee] talk about the importance of getting to know the students. And then when you have them the next year, you already know them so you don’t have to start from the beginning and assess them out and stuff like that, which saves a lot of time really. They can kind of just go straight back in September and get on with it.

Researcher: Consistency comes with continuity and so does in-depth knowledge. Both parents and teachers saw this as an advantage, knowing the needs of a student and then being able to provide a program for that need. Students just tended to see it as part of feeling comfortable in the class. Research confirms this as an advantage. There was stability in the class (Appendix E12) and saving of time between years and the ability to build on previous lessons (Appendix E14).

More time / Flexibility to help individuals / Grouping

Researcher: As a result of the long-term relationships between teachers and students, which led to a more in-depth understanding of the student’s strengths and weaknesses, they [students] could be set up with an individual program tailored to their individual learning and emotional needs. The three teachers in one classroom in control of their school day could accommodate flexible student grouping.

Charlie T: So it’s hard to say if it’s because there was a familiarity and so a relationship established. But I guess you assume so. Initially I guess we felt we had to go the extra mile or whatever to establish that to make that attempt. But, I guess we’ve accommodated, to a large extent, for a lot of individual differences. I think that might be a strong point of the situation. Because you go into it with the understanding you’re going to be here for a long time, so you are

⁴³ A pseudonym for an elementary school in Edson.
more accommodating. And I think you have to, you must, because of the notion of survival and living together (TC1p. 11-12).

**Debbie T:** It's much easier to see the individual needs of the student in a large classroom setting, because if an individual [teammate] is giving instruction, it frees me to help two or three or four at a time, who need very concentrated instruction. We had a really, really nice situation going on earlier this year, where I would take out four students who had serious reading difficulties. They weren't intimidated because they were in a small group and they were willing to sound out words and read things and I like that, I like seeing the progress (TD1p. 4-5).

**Erma T:** I think we were very flexible and I think that the kids realized that they didn't have the same chance in other situations. I fed some of them Math 10 stuff. They didn't complain about having to do it. And some of them have even come back [from high school] and said, “Thank God you made me do it”, because they did get a little better mark than they would have normally (TE1p. 3-4).

**Laura T:** I know I was able to help kids who had trouble in Math because we sat at one table and did it until they could do it. And we could take the time and the rest of the kids weren't held back, the kids who could do it. We also were able to go beyond. Some finished half the Grade Ten Math course before they left (TL1p. 13).

**Researcher:** Some more thoughts from students and parents.

**Dean S:** Overall work isn't as hard. The teachers are able to spend more time with the students even now when there are two**44 of them. A lot of students don't need any help and those that do can get it because there are two teachers in the room at once. So I guess basically that there is a lot, like with two teachers, it seems to help and there aren't that many more students (SD1p. 1).

**Ethel S:** Teachers, I guess, kind of nag you to get your assignments done. It's annoying but it helps. There's a lot of teaching. They teach you and if you don't get things they spend extra time on you, till you get things (SEp. 1).

**Gail S:** It's been really good, all the teachers have offered lots of help and stuff. Just lots of teachers to help out. There is more than just one to help you with doing questions and stuff (SGp. 1).

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44 Two teachers instead of three that the student experienced in his first year of large group as a result of downsizing as enrolment decreased in the second year.
Beth P: I felt the issues they were dealing with too, were sort of continuity, as opposed to students sort of coming into a classroom and then [teachers] only having a bit of time to see that student and dealing with where they’re at and so on. This gave the teachers three years to look at a student and that to me was one of the advantages. My son came in at the beginning of grade seven. They learned where he was, they learned what he was capable of, and then for the next three years he didn’t lose time in classes figuring out where he was at. It relieved him of the apprehension at the beginning of each grade, to come in to start school again and sort of get settled. I think it saves a lot of time (PBp. 1-2).

Dawn P: One of the most significant things I think was the fact that there was reduced adjustment and the difficulty that comes with changing teachers and classrooms every year, you know, in the fall. That was the biggest thing in my mind. I think probably addressing different teaching styles and strengths as well, certainly that’s important (PDp. 1).

Beth P: But the thing that I saw his teachers doing was helping the students that were slower. I know some of the kids that come around our house; I could see this happening with them. Kids that didn’t follow through on assignments before just got lost. The whole follow-up thing, like I felt the teachers spent a lot of time and effort in following up on assignments, making sure students handed them in. For my son it wasn’t really a big deal, because he generally handed them in and if he didn’t he still did enough that he was gonna do all right. But for the students that really need to get that work done to learn, really need to work on a certain skill, the fact that they had to hand it in and especially if they had a parent at home making them do it, it was great. It worked well for them (PBp. 8-9).

Edith P: I keep thinking about complaints that I heard from other people when I was grocery shopping and things like that. I never at anytime thought that one of my kids was being overlooked, that there were too many kids or something and that their problems were not identified. I never felt that way. I always felt as though they were, you know, they were caught right away and dealt with (PEp. 3-4).

Fern P: The other thing is that you have a great variety of levels that the children are working at. By having three teachers you can have one doing the core and one helping the kids that are struggling. You can have another group of the kids that are well ahead maybe working on advanced concepts (PFp. 1). I’m always hearing how kids [in large group classroom] didn’t get picked up, like how they are let to get so far behind and stuff like that. Which really I don’t
understand that because when I talk to the teachers they say it's much easier to keep tabs on a child in the large group instruction than it is if they are going from class to class and having a different teacher for each subject (PFp. 6).

**Researcher** : The increased opportunity for teachers to evaluate and diagnose student skills in reading, writing, mathematics, thinking skills, and social skills was helpful. Most participants interviewed felt that their ability to do this was linked to the time available and the continuity of three years. The research is consistent on this observation in this area. It indicates the teachers' ability to assist students at all levels is one of the most important advantages both as team teachers and the three-year relationship (See Appendix C8, C9, C10, C19, C25, D17 and E5, E10). Teachers were able to deal with students' interests (Appendix C7 and D4) and provide more time and attention to individuals (Appendix C9 and D5). Grouping was easier as there was more time (Appendix C23 and D17). Finally, diagnosing of student skill levels and the ability to implement a remedial program was enhanced (Appendix D10 and E10). The three years together provided continuous progress (Appendix E3) and there was higher achievement especially, for the low-level student (Appendix E4).

**Student evaluation / Quality work.**

**Researcher**: One of the most powerful aspects identified, as a result of the team teaching, large classroom, long-term relationship was the quality and depth of student evaluation. It truly allowed teachers to get to know students and provide remediation for all students at their individual level. As well, teachers could speak to parents about their children in an in-depth way and help students and parents make decisions about their learning and future educational programs. The concentration of developing quality work combined with the use of portfolios got students involved in their own evaluation, including reflection on their work and goal-setting. We will deal with the reporting of student progress in the section on teacher / parents relationships. Here is the discussion of the feelings and insights of teachers, students, and parents about the development of quality work by students and their ability to communicate this in a portfolio.

**Alice T**: I mean I never would have given a zero [rather than accept no assignment], I would have said, "I don't care if it takes you until whatever". Like at Christmas, you know, we [could] send home Christmas packages with the assignments that we wanted finished (TA1p. 9).
Frank T: I think given three years with the same group, large or small, that it would be a benefit [for evaluation purposes]. I still believe that those that have the bulk of everything completed to a quality standard would be able to tackle any education (TFp. 8).

Ike T: I think it [high standards] were worked into our quality work criteria. So I think it was from that perspective we came from and it was just decided what would develop quality work, "You’re going to need this, this and this." I think it did come about naturally, from our expectations (GGHp. 7).

Laura T: I insist on a higher [standard], because there’s no reason to take something just for the sake of taking the assignment. The kids know that if they don’t do it they’re going to get it back, so they usually try to do it better the first time. So the quality is better. It puts more responsibility on the student and I’ve also incorporated a letter home, a monthly letter home where it informs the parents, this in what’s coming up and this is to watch for and this is what they haven’t handed in yet (TLp. 2).

Researcher: Parents agreed that quality work was expected and students responded accordingly.

Ann P: In Jubilee I’ve seen some good results. I have seen that the students do work hard in that class. They have to work hard in that class or they redo, which is a good practice (PAp. 1).

Beth P: They had to have it done to a certain standard. Because, he [son] will sometimes just do what he needs to do and he knows exactly what he needs to do. He just has it right down to the letter. That’s the amount of effort I’m gonna put out. And I think the teachers expecting more of him, pushed him a little bit, which gave him a bit of that challenge at least (PBp. 9).

Ann P: My daughter strives for above quality work, when there was no percentage marking. She was doing her very best, being self-driven, not to reach for that certain mark but to keep up the motivation, to want to learn (PAp. 3).

Researcher: The increased concentration on quality student work in the large group project was influenced by Outcome Based Education philosophy. Part of the improved quality and evaluation of student work was the use of rubrics45.

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45 Rubric is used here to indicate a process where students and teachers work together to set quality standards or necessary criteria for an assignment or project.
Alice T: The idea of a rubric, I just love rubrics, because before I mean you get directions, you write out a set but now even in your own mind they have to be much clearer. You can’t say “I want a paragraph”, you have to say, “I want a paragraph, it has to be this, this and this” and then it’s clear for them what you want and it’s clear for you what you want. And when you’re marking it or looking at it or evaluating it in some way, it’s clear because it’s what you asked (TA1p. 5-6).

Bud T: A rubric right now is a very definite word in their vocabulary and they use it often. They expect it. If you say that we’re going to do a project, the first thing they want to know, “Ok what’s the rubric”.

Laura T: For example at the beginning of the year, we displayed our standards of what we thought a quality product was. Because everyone had a different opinion of what a quality project was and if we didn’t do that then we would be always handing things back, saying re-do, re-do, re-do. It would be frustrating for the kids, so, there’s a standard rubric that we follow and they know and they’ve examples up and around the room that we’ve made into poster form. We will talk about it. We will discuss it. We will write the major points down on the board. We will make sure that everyone understands exactly what has to done or how it’s going to be evaluated (TL1p. 10).

**Student evaluation / Portfolios.**

Researcher: Portfolios were used as the focal point of the student-led parent-teacher conference that were held three times each year. Here are the thoughts of the participants on this key to the communication of student progress.

Gwen T: I think in terms of evaluation, I see our portfolios as probably the biggest insight, as it tells everything about a kid. If you sit down and you say, “Here’s my portfolio, I’d like to share with you something from that”, and then there’s nothing there. Then he flips to the next page, “I’d like to tell you something about Social”, but there’s nothing there, either. It tells you a lot about who that student is and I think that’s the most important evaluation. Like I said it reconfirms that numbers [marks] don’t tell me anything about the students. They just tell me about the stuff and where it fits into a certain category, but it doesn’t tell me about them (TG1p. 9).

Ike T: It’s funny, looking at portfolios, it’s still so easy to see how they are a direct reflection on the kid. The kid doesn’t have it done and you just say, “What does this say about
you?" There’s no argument, like it’s amazing how direct a reflection those portfolios are of the kinds of things that kids do on a daily basis.

**Researcher:** Students generally agreed. I asked them to tell me a little bit about the portfolio, the student-led conference, and if they liked them.

**Ethel S:** I think it’s good, because it gives us a chance to see how we’re doing and sit down with our teachers and our mom and talk to her about what we’re doing. She knows and we know and it gives us a chance to get caught up if we need to get caught up.

**Flora S:** The portfolios are kind of neat I guess because they get you to look back or whatever and see what you did (SFp. 2).

**Gail S:** Sort of valuable, but just for like the goal sheets and stuff. They help set goals, things to look forward to (SGp. 3).

**Hank S:** The portfolios were good. It helps you for the future when you need one for say a job or anything. I like both actually, the mix. The portfolio is good because it just showed what you would do at your best and what your best work is and probably what you’re best at (SHp. 4).

**Researcher:** How about the reflection sheets that you have to do, what do you think about those?

**Ethel S:** I think they’re good.

**Researcher:** What do they make you do that you think is good?

**Ethel S:** They make us think about how we’re doing in school and what we need to improve on.

**Researcher:** Ok. It gives you ideas of goals and future things. How does your mom like the student-led conferences?

**Ethel S:** She likes them and she likes the goal setting things and reflection sheets because it puts a goal I’m going for, not my teachers setting them for me (SEp. 2).

**Commitment / Bonding.**

**Researcher:** This section outlines the bonding between the teacher and student as a result of the in-depth knowledge and continuity. Students seem to be more committed and willing to take responsibility for their learning.

**Laura T:** We did a better job at making relationships as well, because like I said, we were sending our kids off to the high school. It wasn’t somebody else’s kids going it was our kids and you were just as afraid for them as their parents probably were, whether they would do
well or not. I think they got that feeling it was a two-way street. Some of the kids who gave us trouble probably felt a little sheepish about doing so, because they realized afterwards that we probably did care (TL1p. 19).

Gwen T: The other rewarding thing for me is getting to know the kids. Yesterday I saw one of the students [now in high school] who went through the large group program and I still get, “Hello Miss So and So, how are you?” They come over, they talk. I get a different relationship with kids than when [I] worked in small group. I see more of those kids and more of them say, “Hey, how’s it going” and stop by the school to see us and see me on the street and talk. So getting to know kids more than just as a number is also very rewarding (TG1p. 11-12).

Charlie T: There is a great deal of emotional involvement, both with the people you are working with and, of course, with the kids. That’s tough, I mean the emotional role or involvement becomes a little bit more personalized of course because you are now so personally involved with the kids. I mean [family] break ups, kids going through changes, and the hurt that they experience, and the successes and things like that. There are some kids that we really feel close to and I hope that maybe more than your typical teacher / student sort of relationship has established there. We hope that they feel comfortable and that there is a sense of caring there. But, at the same time, as I say, it’s because you’re that close (TC1p. 15).

Alice T: I think we do have a pretty good rapport with the majority of them [students]. Even in the summer I saw a couple of parents and they said, “You know so and so is looking forward to coming back.” One of the boys had said, “There’s no surprises there, I know what’s expected, I know what they want from me”, and it’s really comfortable for them to do that (GABCp. 15).

Heather T: Reflecting on being in a large group over the past few years, you can build those relationships with kids and you can tell the ones that feel close to you like a lot of the girls, you know in our class. They will hug me, you know, if they are having a bad day. They have no problems coming up to you, they cry, they will hug you or even if they are just happy they come and give you a hug or they include you in their lives, they tell you little stories, what they did on the weekend (TH3p. 3-4).

Jeff T: You know the really good thing that came out of this all was the kids really got to know, really got to know us. Like those kids know me inside out and backwards. And I think that they kind of like us, you know. And because they kind of like us, they are reluctant to not work
for us. We’re willing to get after them. They perceive my partner and I as being pretty good teachers and pretty good people, too. You know they say, “Hey, they’re pretty fair”. I think they consider us to be fair people, who will do the right thing and who will teach them (TJ1p. 11).

A lot of happiness working with these kids, you know. We got to be really good friends with a majority of these kids and I’m sure that, you know, if I can see these kids 10, 15, 20 years from now, if I’m still around, they will stop and we will have a good word from them (TJ1p. 18).

**Laura T:** The way things were structured, with having those kids for three years you almost felt like they’re yours. In fact, when you still see them on the street, some of them still come up and give you a hug and talk to you and stuff. Before [large group], once they were gone, they were gone. You got to know them, say, for ten months of the year and you were so focused on getting through the curriculum and doing the day-to-day routines that you didn’t take time to find out personally what stuff was going on. You know, you found out from a few kids, a little bit more background, but you didn’t find that out about everyone. But having 75 kids for three years, you got to know parents, you got to know faces and it wasn’t like, “Why should I know that person?” You know why you knew that person (TL1p. 8).

**Alice T:** The thing is too, I think our results academically, because of our relationship, were better. I was thinking of Provincial Achievement Exams with the Language Arts; they were pretty good that year that my kids took them. I think because of the fact that I had, well for one I had the time, I could steal time from here, we could juggle time around. If they were having problems with something, like when they were doing an essay, that type of thing, we could take extra time. I think they realized that it was important to me that they did well and so some of them tried more, they cared more about it. They didn’t want to disappoint me and my partners. They got into it for that reason.

**Karen T:** I really, really treasured how you got to know the kids. By far that’s the outstanding thing. You get to know the families. We had one parent that would never put his foot in this door and we were able to realize that. But we were able to phone and talk; you wouldn’t know that in an isolated classroom. You are able to relate to one teacher or another. You are able to play on these strengths (TK1p. 10-11).

**Researcher:** Students and parents also felt the commitment of the teachers over three years and it provided time for a caring relationship to develop.
Arlene S: The teachers were always really nice, they were more like a friend than just a teacher. If we had a problem we could always go to them to talk about it (SAp. 3-4).

Ethel S: Yes, working with each other and the teachers, we are even kind of friends, I guess (SEp. 1).

George P: I think he's [son] appreciated having the teachers he has had. He's appreciated the fact that they have pushed him to be the best student he could be and I think he's enjoyed the environment that he's been in (PGp. 1).

Fern P: Like I really feel, when I talk to any of those three that are teaching my daughter, I really feel that they are very committed to it and I really think it is very beneficial and works, which has got to be positive (PFp. 8).

Researcher: The bonding that occurred was obvious because it wasn't prevalent before in the traditional single classroom. There were many examples of student/teacher bonding and stories. The literature indicated that student/teacher bonding was an advantage of team teaching (Appendix D27, E2, and E6).

Responsibility.

Researcher: As the commitment of the teachers became evident to the students and the teachers come to know them over the three years, the students took more responsibility for their behavior.

Edith P: [I saw it in] The enthusiasm they had at home and their real commitment to get more done, and to strive and work harder and to be, you know, to be more productive in school. It seems to be that didn't work for my oldest son but for my daughters it definitely did, more than they ever had in elementary school. They are more confident, more self-awareness, more wanting individual responsibility for their own education (PEp. 1).

Carol P: They [students] have picked up a lot more that this education is more their responsibility. I am really impressed with where he is sitting in grade nine. I'm impressed because I have to say that I went through junior high and I had a problem in Grade 8, and I did all the things that kids do in Grade 8 or 9, missing school and not working hard enough. Thank God I straightened up. But I have envisioned this, "What am I going to do if my kid pulls the stuff that I pulled?" But for some reason in the classroom there is more, he's up every morning to go to school. You never ever have to even call him. I'm really hoping that stays with him in high school. That idea [to stay in school] he has picked up (PCp. 3-4).
Gwen T: I think the changes in this group are that they [students] care about what they’re involved in, they take ownership. I guess that’s what I’m trying to say (TGlp. 19).

Alice T: So they feel, I think, because they know each other so well, a lot of comfort with each other, [there is] more of a comfort zone in taking a risk or challenge because they are not surrounded by people who are going to say, “Oh you’re stupid”. I guess that goes back to just the climate, of how they behave with each other. They seem to be much more responsible (TA1p. 41-42).

Edith P: It seemed to promote, in the individuals, in the kids, responsibility toward their own education. They've never taken full responsibility for it before and they definitely do that now. Well, that may be the age, it may be the group, but I think it is this program, that has done that for them. They do take total responsibility. I don’t have to say, “Did you do your homework?” I don’t have to. They may not do their homework, but then they are working their butts off to get it done, they're sort of managing their own time (PEp. 9).

Student behavior.

Researcher: Much of the literature describes that one of the benefits of the long-term, team teaching relationship on middle level students is an improvement in their behavior and attitude toward school. One of the main complaints of the lobby group at Jubilee School was the possibility of students misbehaving and disrupting the class because there were so many of them, 65 to 75, in one classroom. There also was the accusation that the classroom was disorganized.

Fern P: Well, one of the things that I really think about is the discipline in the classroom. If you have a classroom of, say, 25 students and you have one teacher, that teacher has to teach, instruct, and discipline and sort out problems. I really feel the large group instruction can work because if you’re instructing or something, you really only need one teacher to get the information out and in a class of, say, 60 kids you still have the two other teachers to make sure that the kids are behaving themselves. If there is a problem they can take a child out and discipline them and it doesn’t disrupt the rest of the class. I definitely see with one teacher if they’re having to discipline, then no instruction is being given and it takes up a lot of time. So I don’t know, I think that’s quite an important kind of issue (PFp. 1).

Alice T: You’re able to take someone out and say, “Can you take over the class. I need to talk to this person.” Or you’re able to say, “I need you to take this person out of the class and
talk to them” because I’m teaching or I am too angry and don’t want to deal with them at that moment. So, that’s been really nice (TA1p. 6-7).

**Charlie T:** You know overall we’re looking at a greater number [students]. Yet at the same time there was an opportunity to take a group aside, take an individual aside and consider different opportunities for that individual based on the fact that they were in the group and you could do different things, you had opportunities (TC2p. 3).

**Gary:** One of my observations in the office last year was how teachers dealt with a behavioral problem. Team administrators were able to come into one of the main offices and spend twenty minutes with the student and not in the back of your mind say, “Well, I should be back in the classroom because the kids are by themselves”. I see student-disciplining changing and the quality is better.

**Karen T:** I think there’s a lot of kids who would have been major discipline problems that didn’t develop into that, because of the large group situation. I think there are kids that you’re able to keep on task or with you. You can do more things. You can help more kids, you can get them at their level (TK1p. 21).

**Ike T:** I don’t think I see kids any differently. I always saw them the same way and I think my understanding of their behavior is still pretty much the same. What’s changed is that I found that in this environment students respond better, whether they like it or not they begin to take a stake in what’s there because they exist in that environment [large group]. Eventually they may not proceed with some behaviors because they know that it will bother you or it will offend you in some way. So they tend to maybe not do some of the things that they might normally have done if they could get away with it and didn’t care. I think they do gain a certain amount of responsibility from the environment itself (TI1p. 4).

**Heather T:** When I compare my group of grade nines [large group] right now to the rest of the grade nines [in single classrooms] in this school, they are much more behaved. They are much more respectful of other kids and adults in this building. We still have our four, that push and push and push, but you know we have other kids in our class now that are turning to them and saying, “Shut up”. They’re starting to get them [classmates] on track and trying to make them behave because they’re getting sick of them (TH3p. 4).
**Researcher:** The consensus of both teachers and parents was that student behavior improved. This is most likely due to the fact that students were exposed to a consistency of expectations developed over an extended period of time. As well behavior interventions were timely and consistent (See Appendix C4, D6, and D7). There was time to develop a rapport with students and they had time to take responsibility for their actions (Appendix E7). Trust was developed between student and teachers (Appendix E8). This is consistent with the research findings for team teaching and long-term relationships.

**Safe and Caring Community.**

**Researcher:** One of the major goals outlined in the vision of the Jubilee Project was to create a safe and caring community of learners for students, parents and teachers. Here are their insights on the success of that vision.

**Charlie T:** Well at this age group in particular I’ve noticed that the large group definitely provides them a sense of security. I look at the grade sevens in one particular year and the large group. In that case there were two large groups and I think it was very evident that these kids felt much safer, more secure. Now, whether it’s because they had their defined areas and a number of other things. I’m not sure (GABCp. 16).

**Karen T:** You get in these large classrooms, seeing kids hanging around wanting to talk to you more, because they’re with their buddies and there’s a bigger group, this sort of stuff. Lunch hours too, we found that we were having to schedule who was going to be in the room at lunch hour. Not because of a detention, but the kids wanted to be on the computer or they would want the room and this is with the common area (TK1p. 25).

**Alice T:** I really enjoyed it. It was a lot of fun and I mean 25 of those kids came to my wedding. That to me says it all, like just the fact that you know that they did really well on the exams, not that that’s everything and their growth. Like even Hal46, he moved ahead so much. I see him downtown, I see him talking to people. I was over at the high school; he’s a different kid. You know and I mean, not that he might not have improved and got better at dealing with whatever came at him in a regular classroom, but I don’t think he would have. He felt very safe in our classroom. The kids, because they knew each other really well, were more respectful I think in a lot of ways toward each other.

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46 A special needs student [pseudonym] who came to Jubilee with a full-time teacher assistant.
Charlie T: Well again the notion of the large group addressing that concern. I think it was very effective because we noticed that when the large groups were in place there was a lot less animosity, hostility, fights, aggression. The kids quickly staked the territory and did not necessarily have to defend it because the territory was so large because of the large numbers of individuals. And within the grouping they somehow established a bond (TC3p. 4).

Erma T: I firmly believe that it’s the best way to go. You get to know the kids, you get to KNOW the kids and its, ...life is a lot easier because you can tease and they know when it’s time to get down to business. They know you; your moods and they know when not to bug you and when they can get away with it. It’s just made it a very relaxed, informal classroom and I don’t think the kids have suffered at all for it (TE2p. 3).

Researcher: Here are a couple more stories that show the caring relationship that developed between teachers and students.

Gwen T: At the beginning of this year I had a parent phone and say that [she] wanted to pull their child from our large group instruction. [The parents] thought that maybe a change, not blaming us, not blaming large group, but maybe changing the child out of our classroom would be good. I said, “Okay well, why don’t you discuss it with your child? [She] needs to be in on it. It’s [her] life too”. I believe that at fourteen, you are conscious enough to make decisions for yourself and play a role. And I said, “Please call me back and we’ll sit down together and let’s discuss it first before you make any moves”. Well the parent phoned me back and said; “That her child was in hysterics because she didn’t want to leave her home”. And that’s what they referred to our classroom as, “It was their home,” and she were scared to go elsewhere. It’s where they knew everybody the best. They knew all the students involved, they didn’t want to leave that comfort zone. Sometimes it’s good to leave comfort zones, but I think at this age it’s tender enough that I think it’s good to have relationships and be comfortable with your peers. That’s the biggest conflict area for kids at this age (TG3p. 4-5).

Oh, Chip47 is sort of our success story and he’s the kind of kid that just makes me realize that hey this is so important. I’m in IGA48 one day, it’s the beginning of this year, so he’s in Grade 12. That’s a plus, he’s still in school. This is the kid who said, “I’m going to Vanier”49, I’m

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47 Pseudonym for a special needs student.
48 A local grocery store.
49 Vanier is the K-12 Roman Catholic Separate School in Edson.
leaving this school, this stinks. I’m leaving”. That was three years ago. He had difficulties academically but he’s still in school. His grandparents have raised him. He walked up to me in IGA and he said, “Miss So and So, I haven’t seen you in three years, how are you? I haven’t seen you since I left grade 9.” I said, “I’m really good Chip, how are you?” “Really good I’m in Grade 12 this year”, and I said, “I’m really proud of you, good for you” and he said, ”And I’m so glad, I should come back and visit you guys”. And I said, “Chip I’m really happy to hear that your in school” then he said, “Guess what, I drive, I come in and get all the groceries”. He said. “Did you go look down the aisle at the eggs, they’re on sale today. You’d better go look.” This kid was comparison shopping, in a store, like the real life experience, and to me that meant something. It meant something that he could come up to me and tell me, like he was my child, how proud he was that he had his driver’s license, that he had a car, that he went and did all the grocery shopping for grandma and grandpa. For if you remember grandma was pretty disabled, pretty slow. She had a walker; she was not physically fit, either. She came in once [for interview] that I remember. So he’s taking care of grandma and grandpa, he’s still in school, and he has a car. To me that is sort of the epitome of maybe it [large group] works. We got to this kid (TG3p. 8-9).

Researcher: The parents and students interviewed agreed.

Ann P: It’s been so positive with our daughter, we haven’t had to deal with any negative things. Whatever has motivated her in the classroom they have done very well. I’m sure it’s the whole atmosphere of the classroom, certain things are not acceptable and we will do better. We know that you can perform and we’ve seen that, so instead of letting her slip they encouraged her and it worked (PAp. 9).

George P: I have visited the classroom on a regular basis and thought it to be a very positive place. Strong environment for learning, opportunities for challenging students, and I’ve always felt very comfortable when I’ve gone into visit. I think too, with my child, he has felt more comfortable in the environment that he’s in, than running around all over the school to various classes (PGp. 1).

Hank S: I thought it was a little bit easier than, say, working in like a walk around classroom [moving to individual classroom] because you just stay there most of the time. You don’t have to worry about catching other classes, and digging out stuff from your locker (SHp. 3).
Fern P: She likes the fact she doesn’t have to leave the classroom and kind of trail here and there and everywhere (PFp. 12).

Beth P: From my son’s perspective the big thing was social, to be honest, because he has always been the kind of student that has had some social issues to deal with. He’s always been a little bit of a misfit. Ah, he’s always been extremely large, quite bright and someone that some students are looking to take somebody down. He’s got the big “V”, for victim, on him. So he’s dealt with that throughout [his elementary school]. The thing with SOAR, that he felt good about, is that it was a safer environment. I think it was and I don’t mean safer just in a physical sense but just safer because he knew the teachers better. He didn’t do a bit of hallway stuff, which he hated. That in fact was one reason I wanted him in this classroom because I just thought junior high was gonna be a nightmare for this kid. I though he’s just gonna get pulverized, it’s gonna be a whole lot of peer pressure. It’s going to be nothing but damaging to self-esteem. So for my son it was really important to have less exposure to rough-housing, to have teachers that knew who he was and to have a bit safer environment. I felt really good with the teachers knowing him and being able to work on some of his social issues, too. I never really felt that I achieved that in other classrooms, because he just kind of came in, he went out. By the time they figured him out, he was on to the next grade. I felt he grew a lot socially [in SOAR], because I talked to teachers about his social issues. He also learned you have to deal more as a team because you’re there for the duration and three years is pretty [long] duration for a junior high kid. So they have to learn to work together in certain instances and I think that was another positive learning for him (PBp. 6-7).

Researcher: The development of a caring, safe place was something that participants liked about the large group classroom. There was time to care and work on the safety aspect together. As Noddings (1995) suggests, an “ethics of caring” should be our foundational goal in schools. In the research literature of long-term classrooms, this was cited as the main reason for their implementation. (See Appendix E1, E9, and E12)

Student / Student

Researcher: As mentioned in the Old Story, one of the problem areas of Jubilee School was the transition from Grade Six to Grade Seven. Students often had trouble in their social
relationships with fellow students. The following are some observations on the results of relationships students developed with each other over three years.

**Team Spirit / Esprit de Corps.**

*Edith P:* I don’t know. I really don’t know if that was one of the goals, one of the thoughts that would come out of these large classrooms, but it certainly is something that came out of it for my kids, a connection with the group. And I see that with my daughters of course very much, the entire group is their family (PEp. 1).

*Researcher:* A sentiment held by most students interviewed.

*Arlene S:* I was with all my friends and I wasn’t like, self-conscious, I was self-confident. I don’t know how to explain it. It was fun because I wasn’t standing up in front of the class and I wasn’t scared of saying something, because I knew all my friends were there and they wouldn’t make fun of me (SAp. 1).

*Cassie S:* It was a different change at first, you know going into a classroom with 75 kids, three teachers, I was a little scared at first. How is this going to work and stuff? But it started off ok; it was a big change from what you were use to at the elementary school and stuff. I was worried about junior high as it was. It seemed to start ok, it really helped us get to know the kids and I think that was one of the best parts. We were with those kids for the whole three years. I am a way better friend with a lot of the kids I went to school with in that class now because of that (SCp. 1).

*Arlene S:* The teachers gave us a lot of confidence in what we did and they wouldn’t put you down (SAp. 1).

*Gwen T:* Kit50, for example, picked on by other kids, was involved in lots of conflicts, emotionally very distraught, low self-esteem. She came into our classroom. It took a bit of adjustment but she had a very good year, last year, and this kid has blossomed this year. And I think that’s the student to student, there is acceptance in our classroom, even though they are kids and they still pick on each other sometimes and there’s still that adolescent games and stuff that go on. I think that for the most part it’s the epitome of looking out for one another. One other thing I thought about in student-to-student relationships out of large group is little Rick51, our

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50 A pseudonym for a very shy student who came to the large classroom in the middle of Grade Eight from a single classroom.
51 A pseudonym for a special needs student with medical difficulties.
special needs kid. He was involved in an altercation about three weeks ago, where a student in grade seven punched him in the face. The children in our classroom were so upset. One of the boys, who probably is somewhat of a behavior problem himself, basically picked Rick up and piggybacked him into the school to come looking for me. Rick was bleeding from the mouth. He got hit pretty hard in the face, his glasses were broken, lenses were missing and this tough kid had picked Rick up and carried him into the building and I think that’s [an example of] the student-to-student relationship that has developed. Now this is a kid who still throws paper at Rick, you know he teases him, but they genuinely care for the well being of one another. The tough kids in our class were going to beat up this grade seven kid who punched Rick and “He [student who hit Rick] has a lot of nerve.” It was a real protective kind of thing. Yes, they taunt him, kids still do, I think less in our class than most in the school, but when it comes down to it they are very protective of each other (TG3p. 5-6).

**Researcher:** This team feeling or esprit de corps seems to have led to students helping students. The literature indicates this spirit of “tearness” as one result of team teaching (Appendix C25 and D26). The long-term relationship research also found that team spirit would flourish (Appendix E2).

**Helping each other in the learning process.**

**Alice T:** At the beginning of the year we decided [students] had to have a learning partner, someone they could choose to sit with. So, once they chose their partner, they can sit with that person. I think it sort of provided that comfort zone, the chance to do some socialization, the chance to actually get some help in their learning (GABCp. 30-31).

**Frank T:** I always believed that working with your peers [students] is good, if you can work the lesson around it. I don’t mean to do group work all the time, but somehow get their peers involved as far as maybe just understanding concepts and insights. It’s better coming from them rather than me, or any other adult for that matter. I know for sure that’s true because it does happen more often in the classroom because of the large numbers again. You do tend to utilize the peers a lot more, helpers even for you, or certain kids to help go over science lessons or whatever or just check with your partner (TF1p. 5-6).

**Alice T:** Then they’re encouraging each other, “You’ve got to get finished.” You know I’ll help you with this homework. I’ll explain this Math to you, or whatever. So, I noticed too, a
lot of helping, and not giving answers, but actual helping each other, especially this year with the learning partners (TA1p. 42-43).

**Cassie S:** Probably all the interaction things we did with each other [helped us learn more]. Like we always worked in big groups and we did extra programs, like extra projects that the rest of the classes [single classrooms] didn’t do. And they [teachers] just got us working together (SCp. 1).

**Flora S:** Well, I like having lots of kids in the class. I get along with everyone all the time and teachers have always been good. They help me and so it’s been pretty good (SFp. 1).

**Hank S:** I like when you break off into group projects. You have, say six or seven groups, not just two or three. Where you can learn off other groups and work harder and get to know more people this way, too (SHp. 5). It was easy to interrelate because there were so many people there (SHp. 1).

**Ann P:** They had the opportunity to work in both small and large groups. Students had the opportunity to express themselves when they had to give reports. Having a large group, there are more ideas and skills to share with one another. So I think it’s been part of a very successful program (PAp. 1).

**Fern P:** My daughter feels that in the class there are so many kids to talk to and discuss things with, which actually I found strange in a way coming from my daughter because, on the whole, she is very quiet and you would automatically think she would be more at home in a very small class. But she says, “No”, she enjoys it, even though she doesn’t have what I call close friends and certainly not in the class she hasn’t, but yet she obviously feels very comfortable in there. She says she really enjoys the classroom discussions and again there are so many people, you know, to discuss things with (PFp. 10-11).

**Researcher:** Student-to-student relationships did seem to improve. There seemed to be more connecting between students and more assistance in general both at a work level and social level. They are adolescents, so perfection certainly is not possible as they make mistakes that are part of the learning process at this age. The literature indicates that this cooperation and mutual support can be expected in team teaching with improved discussion skills (Appendix D10).
**Teacher / Parent**

**Researcher:** Another positive outcome of the three-year relationship of the large classroom was the closer relationship between parents and teachers, as they both became more comfortable in meeting and communicating for the benefit of the student.

**Teachers get to know parents and family.**

Heather T: There is a difference because I know all of these parents and I didn’t last year [in single classroom]. Last year the kids you had in your room that were a discipline problem, you talked to parents over the phone, you never met them. The students that were doing well in your class, those are the ones you saw during parent interviews. In large group I’ve met all of these parents. I know them. I know which parents are on board, with us, just by having student-led conferences and having behavior meetings. I don’t have a concern whatsoever to phone any parent in our classroom for behavior or for anything. Like, I feel really comfortable in contacting any of the parents that we have (TH1p. 28).

Alice T: I think just the closer relationship with the kids. You saw them more; we had more time freed up to phone parents, and talk to them, bring them in. We had more parents come then. Now, like I mean even that was easier because you could say, “Ok Mrs. So and So is coming in. Could you explain such and such?” [in middle of lesson] and you could continue teaching (TA2p. 5).

**Parents appreciate and support teachers.**

Gwen T: We have some parents, who I think are very, very supportive of us and spread that throughout the community. We need that because you hear the negative before you hear the positive. One of the children in our classroom, who is doing very well and is fairly well rounded student and has high profile parents, they are out there, you know, raving about how great it is. I think we need that and that’s a little bit of our community partnership there. We need some of that to be happening (GGH1p. 15).

Laura T: We had a lot of people coming up to us afterwards and saying thanks. I mean, you don’t get that [in single classroom], parents and kids. A lot came and said thanks. Like I said, there’s contact still with kids from the high school and we never get that, I mean, in 11 years of teaching [in single classroom] I never got that (TL1p. 15).

Bud T: And we see parents now, not as much as we did in 7 and 8, on a social base. So many more parents volunteer on a trip. They even come in on the Fridays off (TB1p. 16).
Student-led Parent Teacher Conferences (SLPTC).

Researcher: It is hard to split the portfolio from the SLPTC. They are both integral to the whole student evaluation process. But the conference is where the teacher and student report to the parents the progress outlined in the student’s portfolio and the teachers’ progress report.

Ike T: So the more I look at the portfolio, the more it definitely becomes a perfect snapshot of the kid. And the student-led conference, of course, is very powerful because of the whole idea that the student leads it. Information is discusses openly and freely, regarding the student’s progress. They’re there, they can interact, comment, and usually the students spill their guts well before you get a chance to say anything bad. So in that sense it takes the pressure off the teachers as well, because now you’re not the purveyor of bad news, the kid has done that. So in that respect regarding evaluation, it should be mandatory everywhere, half an hour, three times a year. It’s not a big think to ask (TI1p. 6).

Alice T: I love student-led conferences. It takes a long time, but I think it’s worth it. I just think they are great, I really enjoy sitting watching a student interact with a parent, and then watching them show what they’ve done, what they haven’t done, and then the progress report, and it’s all there. I mean they don’t even really have to see the progress report [teacher generated]. It’s interesting listening to them talk about their assignments, these that they like, the ones that they didn’t like, why they liked them, why they handed it in late, or whatever. They always have a story (TA1p. 25).

Bud T: And it’s surprising the number of times I would sit at an interview and the parent would say, “Oh, I’ve read this before. This is a good one”, and it was in their portfolio. So, I think there’s a lot of communication between a student and parent at home, which is kind of, well not shocked, but you know it’s nice, nice to see. Our group had always had between eighty to ninety percent parent attendance.

Researcher: Again, students and parents were generally in favor of student-led conferences.

Cassie S: At first they [parents] were a little unsure about it because, you know, this is a new thing and they didn’t know if it was going to work. Like, how are you going to work with 75 kids in a class? They thought it was going to be all chaotic. At first the kids were unsure, too, and we did a lot of complaining about it. So our parents didn’t think it was going to work out but they learned lots. They got to know a lot more of what we were doing with our parent teacher
interviews. We led them and we showed them the kind of work we were doing and the teachers sat there and did their input and I think my parents appreciated that because they like to know what is going on in my school work. They thought they were included in it. And that was the biggest part of the course that they liked that they always could know what was going on. They could always phone one of the teachers and say, “Oh, how is my daughter doing?” or “What are you guys doing now?” So I think that was a really good part (SCp. 3-4).

Arlene S: They were good. Because they [teachers] made us show our work to our parents. They had to be right there. If there was a low mark on it, they would tell us why and try [to get us] to improve our skills (SAp. 2).

Dean S: Yes, well the portfolio, they [parents] learned about a lot. They found out more about your classes, because I don’t go down to the details. So they see how I’m doing on each specific subject and each different type of thing so I guess that would show them more (SDp. 5).

Researcher: Two other students interviewed liked the interviews because teachers and parents got to offer their input. The following parents summarize their feelings.

Ann P: Don’t go back to your old, sit down with your teacher and just talk about your child. We want our kids to be involved. The younger the better (PAp. 6).

George P: I think there has been a lot of positive spin-offs. Parent / student / teacher conferences, the progress reports, the opportunity to sit down with two teachers rather than a panel of teachers to talk about the progress of a child (PGp. 1).

Researcher: The following comment by a teacher seems to sum up teachers’ feelings about student evaluations.

Charlie T: SLTPCs are probably the most powerful thing that we’ve done over the years. I believe portfolios are accomplishments. Definitely, [they are] an emotional experience, for kids, although they don’t show it quite as readily, other than those who are not ready to perform or to display. For parents [there were], many, many moving experiences of parents interacting with their kids. I’ve seen things that have been quite impressive and so it’s something that I’m sure is a must. It really opens the opportunities. I think it lets the kids talk to their parents and take pride in what they do. So I guess, as a form of evaluation, maybe that’s the way to do it. I know we did a project, I think in Grade Seven. It was on culture, and kids had to do a presentation, which we videotaped. They actually showed that videotape to parents, or segments of it, as part of their student-led conference. They couldn’t resist. You could just see how, even
those who maybe didn’t feel they did an exceptionally good job, really felt it was so interesting and such a good way of showing it to their parents, such a novel way, they really enjoyed it (TC1p. 14-15).

**Researcher:** The research literature certainly indicated that improved student evaluation techniques, as the result of team teaching, was an advantage. It was not specific about portfolios or SLPTC but cited consistent expectations and improved work and attitudes (Appendix C17 and D3).

**Open communication.**

**Charlie T:** Success within the school setting is enhanced when parents or guardians and teachers work in cooperation to encourage student achievement and success. Large group instruction provides the opportunity for direct parent involvement by encouraging them to become part of the classroom experience, whenever possible. This setting allows for the early identification of any conditions or situations that may interfere with student learning and the contacting of the home. The large group setting facilitates a strong communication link between parents and the school to be established early and maintained for the benefit of the student. (TC1p. 33).

**Researcher:** As teachers and parents get to know each other over the three years and have a continuity of experiences, especially through the student-led parent teacher conferences, communication channels open up. The fact that a teacher from the team can meet or talk on the telephone to a parent at any time during the day seems to be more conducive to communication.

**Gwen T:** I’ve noticed that over just the last eight months specifically in this group, that our parents, I think, are a lot more self-confident in talking to us. [They] can pick up the phone and there is a lot more open communication. That has taken time and I think they’re finally comfortable with being able to phone us and say, “Hey, this is so and so, what’s happening with my kid?” And they’re confident that something is going to be done and that we can work as a team with them and their student to make things happen (TG1p. 20).

**Carol P:** The thing I like most is, I can go in and find out where my son if at just like that (snap of finger). I walk in on my lunch-hour, they are still in class52, and I can find out from the teacher what assignments are missing, where he is, what his marks were. I don’t have to

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52 Jubilee School’s lunch hour was from 12:30 to 1:30.
make an appointment, I don’t have to wait, and it’s so open, it’s so open to keep you informed on where your kid is (PCp. 6).

**Dawn P:** I think it was good from the feedback that I could get, because I wasn’t able to come in and spend time in the classroom (PDP. 4).

**Trust / Comfort level**

**Researcher:** Improved communication and increased commitment led to a trust and comfort level between parents and teachers.

**Alice T:** You know after that first conference, parents know what to expect thereafter. You know when they first come in, they’re like, you know a lot of parents have bad feelings about school. What is this conference? What does that mean? A student-led conference? But, once they’ve went through it once or twice, they say, “Why don’t you [student] get started.” and it’s interesting watching them. They know what they’re supposed to do, what their kids are supposed to do, and they just do it (TA1p. 43-44).

We had one parent that couldn’t come in because of work conflict so we phoned early in the morning to have them come in at 8:30 at night (TA1p. 23).

**Bud T:** Well, since grade seven, we know our parents, most of them on a first name basis. In the traditional, it was “Mr. This” and “Mrs. That” (TB1p. 16).

**Charlie T:** I don’t think we’re a novelty any longer. I think this group of teachers and students have established themselves. And in fact, I think we established ourselves with both parents and students quite early. I think because of that there was a sense of security both amongst the parents and I guess the community at large. And therefore, as I said the apprehension or perhaps the waiting for doom to occur was dispelled. It was quickly totally eliminated, so people just let it go (GABCp. 18).

**Laura T:** Well, I still have parents phone me. Their kids are having problems at the High School and they want to know what to do about it and they still phone at home. They were so used to dealing with us [in large group]; they feel comfortable enough to [continue to] deal with us (TL1p. 8).

**Karen T:** I noticed the parents were far more willing to walk in through the doors. We had checklists and we had mark books. I had two parents who had no [hesitation] coming to see the checklist. They knew I was always accurate keeping them up to date and they would go over
and say, "Oh Karen can I see your mark book". Now that’s comfort level I don’t see in a small class (TK1p. 22).

**Laura T:** I had a lot of people [parents] who were in Grade Six come to me and ask what would I do if it was my child and I always recommended putting them in a large group. If it’s still around, my daughter will be in large group (TL1p. 31-32).

**Researcher:** The feeling of the parents interviewed was reciprocal.

**Carol P:** I felt totally comfortable walking in right from day one. I feel more comfortable coming into Jubilee as an adult than I did as a kid. From day one I was allowed just to walk-in, whenever, I didn’t have to phone them, I didn’t have to make an appointment, and I just went in. I would just show up and I felt very comfortable doing it. I didn’t feel out of place. I try to make it in at least once a month, twice a month. Just to walk in, and I mean sometimes my son wouldn’t even know I was showing up and the teachers never seemed to mind, I walked into a classroom, My son wasn’t even in there, he’d be in PhysEd. I’d just be in the classroom and just maybe watching the teachers, how they were interacting. They never said that they were uncomfortable but I mean my kid wasn’t in there but I still was sitting in there (PCp. 2-3).

**Fern P:** I feel very comfortable with them. I feel that if I did have concerns that I could come and talk to them (PFp. 4).

**Researcher:** The parent teacher relationship seemed to develop because of the openness to communication, the ability to talk with parents at any time during the school day. All three teachers could talk about the parent’s child wholistically, from all subject and skill levels. This, plus the constant nature of the class in one place, most of the day, seemed to invite more parent contact. As it was with the students, three years allowed the opportunity for teachers and parents to get to know each other. The relationship was one of growing mutual trust and respect. The research was quite definitive about the improved parent / teacher relationships as a result of the team teaching and three years together (Appendix D24, D28, and E16).

This completes the discussion of the experiences in the long-term relationship of the participants in the Jubilee project over three years, the Present Story. What about the future? How will their feelings change as they move onto the next stage of their educational journey? Here is a conversation that addresses these questions, the New Story.
New Story - Relationships

Researcher: There was an overwhelming feeling by all participants interviewed that the large group classroom was beneficial to all and an excellent learning environment. The relationship between teacher / student / parent was very close and the bonding carried over even as the students left Jubilee and entered the high school. The opportunity for more in-depth communication was improved and trust was built between the participants. The development of a caring community seemed to be the outcome. However, the downside was that for those who did not experience the three-year relationship, or expressed their dislike of it, the large group format was discredited. The effects of the lobby group compromise of providing choice of a traditional single classroom and the return to student report card marks is the topic of the next conversation, the New Story.

Introduction

Researcher: In the Story Model\textsuperscript{53} (Drake, 1993) the present story is depicted as moving into the future. The future emerges out of the "ideal" and "projected" story and results in a "new" story. The ideal story is the scenario that would unfold if the alternative or visionary views were to become the norm, without compromise. The projected story is the scenario that would unfold if the traditional values and actions of the old story were to continue into the future. The new story is an integration of both the projected and ideal stories. It is the blending of what we can realistically expect from the emerging ideal story and the essentials that we must keep from the old story (Drake et al, p.13-14).

In the case of the large group instruction at Jubilee the ideal story would have seen a school move from a traditional junior high school to a K to 8 school with multi-grade or age groups integrated as to ability of students, with teams of teachers working together for three or more years. The curriculum would be integrated, both in subject and within the community. The walls of the school would become more transparent and there would be a continuous movement of people and resources from the community into the school and from the school into the community. Students would work in collaborative and cooperative situations with peers, younger students, parents, and adults in the community. Teachers would become more like counselors, facilitators, coaches and guides for their students. Students' individual programs would reflect

\textsuperscript{53} See Appendix O.
their abilities and interests. Their assessment would be based on self, peer, adult and teacher evaluation, which would not be reduced to a grade or mark but include the development of a portfolio which chronicled their demonstrations of skills, knowledge, attitudes, and talents.

The projected story would be a continuation of traditional junior high school or a form of the old story.

The new story for Jubilee School at this moment is the combination of both scenarios. Some parents demanded a return to the education of their youth, one that they “knew”, while others wished to move in a new, future oriented direction. We attempted to create a dual track, large group and individual classroom format at the three grade levels. For the individual classrooms there was an attempt in the timetabling to reduce the number of teachers a student would see in small group classrooms to three for the six core subjects (a form of block timetabling). Also an attempt was made to have these teachers follow these students through the three grades. This was not always achievable as teachers need to have a full teaching load and that may mean teaching more than the three homerooms of their team. In fact, they may also have to teach at different grade levels to complete their teaching schedule. So we started to see the erosion of the team concept, demonstrating one of the disadvantages of the high school-style subject timetable.

The student evaluation program became a combination of marks, teacher progress report, and SLPTC. Again as teachers were in their own classrooms, the portfolio tended to be difficult to coordinate. For example, who would hold the portfolio? What would go in it? Who would be the coordinator of the portfolio process? As well, student-led conferences became almost impossible to schedule with all the individual teachers together at one time with student and parent. So the tendency to fall back to the traditional parent teacher conference began to prevail.

The last large group finished in June 1999. Over the two years, 1997-1998, no new large group classrooms started because too few parents chose the large group option. So as of the writing of this thesis, there were no large groups operating at Jubilee. The current principal has attempted to keep block timetabling and the portfolio and SLPTC alive, but only a shadow of the former large group format.

The following is a conversation with the teachers who had experienced the team teaching in the large group and now were back in their individual classrooms.
Teacher / Teacher

Alice T: I miss having someone there to give me input, like, “That lesson really went well.” or, “That didn’t work well.” or “Maybe you should have looked at that when you disciplined her or him.” I miss that. Let’s say you [as principal] came into my room tomorrow. It’s not the same, because you don’t know the kids, you don’t know the situation, you don’t know what happened last week or an hour before. It’s different that way; you don’t know the kids as well as we did. when we did the big class (TA2p. 1). The relationships, the time, all of the factors that go together are what make for advantages of large group (TA3p. 4).

Charlie T: I guess, you can’t replace the opportunities arising from the large group environment, because of the physical nature that the one group put everybody together, and that whole dynamic (TC2p. 4).

Frank T: I still think it [large group classrooms] would be much more worthwhile. The only good thing that came out of it really, right now, is the fact that we’re still working in teams [but in single classrooms]. I like the idea of being [part of] a team. I like the idea of keeping the Grade Seven class right through to Grade Nine (TF3p. 2).

Ike T: I think the kinds of things that I missed the most, I certainly missed the support of my colleagues, the day to day interaction, talking about kids, “Are we on the right track? Are we doing the right thing? Who has this problem? Who has that one?” And just the peace of mind of knowing that there was someone else who would either verify the kinds of thoughts and observations that I’d had but also just being there for support. [I miss the times when other teachers would say,] “Things are not going well.” “Gee can you just kind of help me out in this respect?” I miss doing that for others, too, because I think that providing support for other people in tough situation like teaching, is a very positive thing, personally. And I would like to add, that I also very much miss the connection I had with the kids and seeing them all day long. I really, really miss that.

Alice T: I still wouldn’t have wanted to be in our new teacher’s shoes because she came in and she didn’t know what it [large group classroom] was like and she probably is really enjoying it [block timetabling] but, to me, that’s not the large classroom. A large classroom is like what the two-teacher team still in operation is doing. I would have done it with two people; I would do it with two people because you still have the strength together, of being with these kids most of the time (TA2p. 8).
**Teacher / Student**

Debbie T: One thing I really miss is working with the kids in that class for three years. You develop a very good relationship with most of the students and I really missed that this year. I miss having that continuity from year to year and knowing the students' personalities at the beginning of the year and what they're capable of doing and their work habits. You just get rid of all the feeling each other out during the first three weeks of school. I just see that as a real positive (TD2p. 2).

Laura T: There is definitely not the same connection [with students] in teaching in a small classroom.

Gary: If a student is having a bad day at 9:30, at 9:45 in a single classroom he might be gone, sent to the office. You probably will never see him again so you never know what happened to him. He’s dealt with in the office, “Out of sight out of mind.” The team teachers didn’t have to do that. If a student is in that mood you go over there, sit down, talk it out without disturbing the rest of the class. How do we reproduce that? We can’t, because we’re separated into our classrooms. That’s one of the little intangibles concerning team teaching and long-term relationships that you have a difficult time explaining to non-educators.

Ike T: Well, I’d have to say that I found this year [back in single classroom] somewhat of a struggle. I found that it was difficult without the support of my colleagues, being there day to day. I found that the students came into my class for their 50 minutes a day and they really didn’t care about me a great deal, I was just another notch on the post in the course of their day. I found there was a significant change in the attitude that the students had toward me and I think in my attitude toward the students. I didn’t feel a closeness. I didn’t feel a bond that I felt when I was in the large group. That was a struggle as I tried to build that with the small group class. It didn’t manifest itself quite the same way (TI2p. 1-2).

Alice T: Well, I miss classroom management, I mean, before [in large group] I could say, “Teammates, he’s really irritating me. Take him out”, or “Please talk to her”. Or I’d just stop the class and say, “Well, Mr. So and So, could you please take this student out?” and they would deal with it and I could continue, just sort of break my stride and keep going. Now it’s like you have to take them out into the hall. You have to talk to them, or you have to stop the whole class and talk to them for a couple of minutes or you have to find a space for them, call someone
and say, “Could you take this child?” I mean it breaks up your whole lesson, if you’re in the zone, it kind of takes you out (TA2p. 4-5).

Debbie T: Being outside the large group classroom this year, I found that I really miss the large group instruction and I see even more clearly the benefit of the group because they just have so many more opportunities than a small group. I see these teachers struggling, even with things like portfolios, trying to get together to do portfolios and things like that and it’s so much easier for the teachers involved in large group to follow up on things like that. The logistics of teaching a small group just don’t make any sense. In fact, I overheard a student talking about three weeks ago. He had transferred out of the large group into a small class and he was telling his buddy, “Yeah, I can go from class to class and have a chance every class”. In large group the first thing in the morning if he started fooling around that basically set the tone for him all day and he would be dealt with. Now he feels that he can get away with things from class to class and he probably can. The teachers can’t track these kids and I have a feeling that’s exactly what he’s doing (TD2p. 1).

Safe place.

Alice T: Actually they [students in large group] are more comfortable. I think from the beginning and again my teammate said, “Well maybe it’s because they had a Grade Seven area where they were all safe and close.” Now the Grade Sevens, I don’t mean to criticize but, they’re down with the Grade Nines. It can be very imposing to walk down to where there are all of the Grade Nine lockers and homerooms. There’s no safety net (TA1p. 39-40).

Student Evaluation.

Debbie T: I think a student-led conference is kind of pointless without a portfolio, without their work to present. We also found this year that a lot more students do not have a portfolio. They choose not to compile their work and, for some reason, the parents don’t mind. There’s a lot of value in portfolios, in having the kids present their best work, because I think it prepares them for the future. Unfortunately, I also see that a lot of parents don’t see the value in it, and would prefer to just come in, talk to the teacher, get the guff and leave (TD1p. 7).

Bud T: We did portfolios together [teachers in block timetable] and it ran not quite as smoothly, once again because we weren’t there at the same time, but we managed to scrape up enough time to get together, make out a menu in each subject area. We figured out what was
important and we liked the portfolio, we like the student-led conferences. That idea has not changed. It’s still a positive thing to do.

Researcher: Is there a possibility that as the school gets more comfortable with block time tabling, the staff will be able to go off and do a similar thing as large group SLPTC?

Bud T: I kind of think we can get close but it will never be the same. I don’t think that closeness will be there (TB2p. 5).

Charlie T: Well, the student-led conference now has taken on a different format, and I guess we will have to see where that goes. It isn’t anywhere near what it was when we were in large group. I think we may be able to pursue that style of portfolio presentation. It would have to be, of course, coordinated now and we are all again aware of the difficulties of that. So in terms of the portfolio, it still has its value but it doesn’t have the impact that we saw it have. When you had the students sit down and present to their parents their portfolio, it was very much a real experience for everybody then to participate, teachers included (Tc2p. 3).

Debbie T: Student-led conferences are dropping off this year. I see the parent sitting there almost politely, while the kid goes through the portfolio. I don’t like that. I don’t like the fact that parents are not interested in seeing a presentation of their child’s work. The parents are kind of just sitting through them because this is what has to be done. I saw different things last year. I saw parents flipping through their kid’s binder book [saying], “That’s good. When did you do this?” That was very satisfying for the child, too (TD1p. 20).

Ike T: Well, I will have to admit that with the large group, the portfolios, the student-led conferences were terrific. Those were, and I’ve stated that before, those were some of the most powerful things. In the small group situation this year I would classify it as being almost impossible to follow through to the same level of success that we were able to have at the large group. What I found happened was that the students didn’t care about their portfolios. There was no commitment to portfolios; it was just a thing where they put a bunch of junk in from your class, this class, and that class because that’s the way it was. I found it hard to coordinate because it was tossed on top of [the work of] the Language Arts teacher. I found it very hard to coordinate because I didn’t have input into necessarily what went into it, whereas with the large group we sat down, figured out what do we need in here. We talked to the kids; it was very much a shared experience. With the small group it was a shared experience in that we were going to have this, this, this, and this but we really didn’t know what was there. Some of the kids didn’t have them
as well. More kids did not have a portfolio, or a completed portfolio because, “Oh, it’s in my locker”, or “I forgot it in that other class”, “Oh, it’s at home right now”. In the large group situation, it’s in the room. You want it, you open up the cupboard, you get it, you work on it, and you put it back. And so this year it was easy for kids to ignore it and deflect the responsibility for taking care of it. I found that the student-led conferences really were not student-led conferences. They were the old style parent-teacher interviews. Very few parents brought their children and the situation did not lend itself well to having students actually lead the conference. So it usually ended up being a parent-teacher interview with the student there and so I would tend to ask the student questions but it didn’t have the same power as the typical large group conference (TL2p. 3-4).

**Provincial Achievement Tests (PATS).**

Erma T: Our best integrated unit was the consumer product testing in Grade Eight. We worked all the way around to make it happen. But then in Grade Nine we went back to subjects because of the achievement exams (GDEfp. 3).

Bud T : I would love to get rid of the exams. They hinder us at the Grade Nine level.

Researcher: Did they learn less at Grade 7 and 8 because there were no PATs?

Bud T: Definitely not.

Researcher: Did they learn the basics of the curriculum?

Bud T: They learned more; there is no doubt about it (TB1p. 14). They [PATs] have had a negative effect. We’re going to have to start teaching to a test, teaching to the book. In the new Math curriculum especially, it’s changed quite a bit. There’s a lot of Grade Ten content in it and we just can’t afford to waste time. You have to cover the whole thing before those achievement exams. It’s difficult (TB1p. 5-6).

Alice T: I mean something like achievement test, my kids in Grade Nine [single classroom] this year in Social did not do as well as my kids last year [large group classroom]. I compare their results and just the way they approached the exam to the way my large group kids approached it. It was totally different and that was my grade nine class right after, the next year after the large group. I’m not a different teacher. It’s just that I was able to take more time with them [large group]. I knew them better. I could say, “You have had problems with this in the past, you should work on this”. Whereas these kids, I mean, I have 9D and they are a wonderful class. They are, from all the Grade 9 accounts, the best Grade 9s, but I just don’t know them as
well, and I don’t know their strengths. I came in having never taught them, I have never known them before (TA2p. 6-7).

**Marks.**

**Researcher:** The return to marks was one of the compromises made with the lobby group. Here is a conversation on that issue that became one of the real disappointments of the large group teams.

**Gary:** One of the compromises developed and one of the demands by the parents was a return to marks. The school division had been implementing OBE initiatives for about three years when the lobby group came forward. Jubilee, as part of the large group project, developed portfolios, progress reports and student-led conferences as our way of informing students and parents about a student’s progress. Accordingly, when we returned to marks, or at least a combination of marks and the other methods, the teachers had some experience in both by which to compare.

**Gwen T:** I really believe from the start that marks didn’t tell you anything and having gone back to them this year, I know that that’s true. They don’t tell anything about the kid. All it tells us is that they gave you some stuff. But, they don’t tell you about their ability, they don’t tell you about their skills. (TG1p. 8-9)

In our group the students have to be there [SLPTC]. It has to be as it is called, student-led. They talk about themselves and they talk about what they’re capable of doing, what their improvements could be. It is much more real. It’s them talking about themselves, it’s not some number pulled out of the air.

I think it reconfirms, on a positive side that they are a “person” and they get to talk about themselves and not a numeric value. I felt as a student that I was being judged with a number. I always felt that was really unjust. When we can do a portfolio and we can say, “Look these are the skills that your students are able to achieve. They can do this, they can do a current event, they can do this,” that tells you more about your child than you would have known if I said, “Oh, they’re a 70% student.” [It begs the questions] “Oh, what 30% can’t they do”. They don’t tell you anything and so it’s a combination of looking at the general skill in subject area, and the portfolio. That tells you a whole lot about your student (TG1p. 9-10).

**Ike T:** We’ve lost some quality. There’s no question about that. For me the biggest thing was always that as soon as I put that number on that page, as long as it’s 50% or greater they no
longer cared about it. It no longer makes any difference and that’s one thing that I was frustrated with. At least working with no marks, I can identify what was wrong and say, “This is not good enough because of this. Now make this change and we’ll talk. I’ll accept it as a completed assignment.” Now, on an assignment, I might have to give 60% because it’s probably that good or 70%, but is it good enough? Not as far as I’m concerned. Or is it enough for them? No, not good enough for them. But again, soon as I put that number on it, because marks tend to be time based. I’m limited to the amount of time I can give them to do a particular piece of work without pulling my hair out trying to go back and re-calculate and all that other crap. In that sense I think we’ve lost. We’ve lost a lot in terms of quality work and students taking responsibility for their own learning, because the mark takes the responsibility away from them (TI1p. 8-9).

**Individual remediation.**

Laura T: The most frustrating part about being in a small classroom this year? It’s because I know what success I had in the large group and I know what kind of successes I’m having now. I transferred as much as physically possible over to the small classroom and they don’t even know it. But, I know I’m doing things differently. But I’m not reaching as many kids for example, kids like Mac54. I cannot physically help him in a period, because he needs me for sixty out of the sixty minutes. There is no way that I can leave the rest of the kids for that long to help him. There’s no way now but, in a large group, that wouldn’t have been a problem. He would have had the “one on one” help.

Karen T: See like this is where in a small class kids like Jed55 just die. He’s died this year. He’s gone down in flames. In a large class last year when you had that spare teacher, you could keep him on task. You could keep him going. You could work with Jed at where he was. You could place Jed where he could work. This year, putting him in a small class is just so stupid (TK1p. 9).

Researcher: The ability to deal effectively with student evaluation and the development of remediation programs was greatly hindered when teachers found themselves back in single isolated classrooms. Block time-tabling did help somewhat for the team of teachers diagnosing problems but individual programs were difficult to coordinate from the position of the isolated single classroom.

54 Mac is a special needs student with academic and behavioral difficulties.
55 Jed is also a special needs student with academic and behavioral difficulties.
**Student / Student**

**Researcher:** There were no comments made during the interviews about changes in student / student relationships after a return to individual classrooms.

**Gary:** In my view from the principal's office I saw a slow return to the former behaviors of students before the large group project. There were more conflicts between students at Grade Seven and student behavior generally worsened as I dealt with student behavior problems rather than teams, and as individual teachers sent students to the office to be dealt with.

**Teacher / Parent**

**Gary:** As I watched over the last two years as we went back to some single classrooms, the parent / teacher relationship returned to the former pattern. Some teachers did well to make contact with parents, while others weren’t so diligent. Behavior problems were again passed on to the administrators in the office more readily. This resulted in the administrator, not the team of teachers, contacting and dealing with the home. Student-led parent-teacher conferences slowly returned to parent-teacher interviews, while the attendance at them returned to the 33% range from the 90% we had in large group. I just didn’t see the same commitment by the teachers as I had before. Nor did I see the corresponding supportive feeling of parents.

**Researcher:** So just give me a feel on this. Because the school had moved back to marks, you found most of the parents didn’t really care about the other stuff, portfolio and progress report, when they came in. They were really just interested in the mark or they were interested because they knew the marks were coming. They were prepared to sit and listen politely knowing that they’d soon get the real stuff, the marks.

**Frank T:** Some are even smarter than that. They come in and say they don’t want to go through it [portfolios presented at a SLPTC]. When the mark wasn’t there they were still concerned with all that. They were much more attentive of the details, the specifics as to why.

**Researcher:** Did you see the difference? You had three years in a team? I think a lot of your parents really enjoyed the idea that you were giving them this information, the portfolio?

**Erma T:** Our parents were happy to know that they were above average or average or below and most of the ones that were below knew that. But the parents wanted to see the progress report, they wanted to know the missing assignments.
Debbie T: I think some of the parents don’t mind if their kids pull off 60 or 65. To them that’s an acceptable mark.

Researcher: So, basically, what you’re saying is in many cases the parent would rather have their children get a 60% than fight with them to get them to hand in quality assignments in the class.

Erma T: Absolutely. I think we’ve got probably 50% of parents like that, that would like nothing better than for us to just send a percentage home at the end of the year (GDEFp. 31-33).

Debbie T: The primary problem I think is that some of the parents that are still hung up on marks, that they don’t, they can’t open their minds to what the marks actually mean, which is very little. One major disappointment for me is that we actually had to establish 50% as a pass as a school56. You know that, especially working so hard with these guys last year and taking assignments four or five times, if necessary, is sad. We’re working on quality and, all of a sudden, we’re back to square one. I’ve noticed though, a lot less assignments come in now. I get maybe half of the assignments if I’m lucky (TD1p. 5-6).

Researcher: Some parents who had experience with portfolios and SLPTC’s tended to agree with the teachers.

Fern P: You know in the end, what I prefer reading about my children, whether it is here or in elementary, never mind marks, it’s the comments and what they actually write about your child (PFp. 9).

Ann P: I see her working very hard, being prompt in doing her assignments. This assures me she is learning a greater percentage. From all the teacher progress reports I know how my daughter is doing, I don’t need any marks to tell me where she’s at (PAp. 3).

Beth P: Ok, as far as skill development [is concerned] I really liked that. I liked the idea that I could look at what Brad was doing and I could figure out where his skill level was at, where he was lacking. I wasn’t looking at an 80 or 75 and not really knowing what he knew or what didn’t he know. I really appreciated always getting from the large group teachers a breakdown of curriculum skills that really needed to be covered and then the check marks as to where my son was at. Even an indication not only what he completed but where he was at in development of some of the others (PBp. 1).

56 A provincial mandated standard, 50% is considered a passing grade.
Researcher: I believe there was an overwhelming agreement among participants interviewed that the three-year experience was positive and one that should be continued. The concluding chapter of this thesis will provide space for the principal and the researcher to consider the overall effect of this study on all participants and the wider educational research community. A meta-reflection of this research project and the research questions is undertaken in the final chapter. To conclude this discussion, I would like to provide an opportunity for the participants to discuss the challenges and thoughts about what could have been done differently.

Hindsight - Challenges / Do Differently

Researcher: It would seem from the previous conversations, that the large group format was without difficulties or challenges. Of course this is not true, but certainly the feedback that I encountered as I interviewed teachers, students, and parents was overwhelming positive, glowing in fact. The following conversation among participants deals with the aspects of the large group classroom that they found challenging and some thoughts on what they would have done differently if they had the benefit of hindsight. Each group speaks, in turn, as they tended to talk about the areas with which they were most concerned.

Teacher View

Organization of the team.

Researcher: Most teachers liked the three-teacher teams as they provided more flexibility, variety and support. But a few liked the pair of teachers as that structure reduced communication problems, as long as the two were compatible.

Charlie T: Yes, it seems that there is potential with two, but I think the three is probably an optimum number (TC2p. 5).

Researcher: A couple of the students interviewed commented on this topic.

Ethel S: I probably would keep [them]. Last year, we had three teachers, and this year we have the two. I think the three was probably better because we got a lot of attention with two but with three we got more (SEp. 1).

Flora S: In my first two years of junior high I had three teachers teaching the large class. In Grade Nine I only had two teachers. I preferred having the three teachers better. We then had a little more variety of teachers but still in the large class format (SFp. 3).
Researcher: Another concern was to ensure at least one of each sex on the team to provide a balance. In one of our two teacher teams we had two females, which worked out fine but you probably need to have both. As one of the members said, “I never really thought of that before and in some ways it’s a benefit to have a combination of male and female. It provides more flexibility as you can reach more kids because they may respond differently to a male or female.” (TG2p 2).

Gary: There was some concern over choosing teammates?

Researcher: Yes, a few teachers mentioned that it is essential for the team to choose each other and have similar philosophies. They said it was imperative that teachers not be forced to become part of a team, especially for administrative convenience. This did happen in one instance, didn’t it?

Gary: Yes, the year I returned from sabbatical leave, one member of a team had moved and a replacement was chosen by the Director of Education. She was not even a member of Jubilee School. In fact, she was an elementary teacher. I think she did ok, but that was the year of the lobby group and everything was criticized. I certainly believe that teachers must first believe there is merit in team teaching and long-term relationships before they start or it doesn’t matter whether they choose or are assigned, it makes it more difficult for the team to work out.

Researcher: One other challenge mentioned by teachers, but more a suggestion, was that the team leadership rotate among the three team members for the three years as that would allow each to experience belonging to the school admin team and ensure that no one team member become the “bad guy” disciplinarian.

Size of classroom / Student numbers.

Researcher: Each of these issues, although mundane, are very crucial to the success of the large group classroom. The teachers from ORCA and RIGHT teams, who started in the year of the lobby group, mentioned that they started with 80 or so students in their first year and a classroom that wasn’t quite as large as the original SOAR room. They felt it led to some problems.

Gary: Let me deal with each of these issues. The original SOAR room was a combination of two classrooms that were larger than the normal ones in Jubilee. There was a temporary wall between them and, thus, the renovation to join them was much easier, quicker and cheaper. Then as we moved to renovate the whole school, we had to deal with more serious
structural constraints. At the time the Maintenance Director assured me that the new rooms would be as large as the SOAR room but, in the end, they were not and they also were more rectangular, not square like the SOAR room. This did cause some dissension among the teams. However, I think one of the biggest problems was that some teams saw the large group format as that, one large class. At the beginning they kept the students in the large group lecture situation for much of the day, which would lead to student behavior difficulties and also the wrath of the lobby group. In other words the team had decided to make a large box (team teaching) out of three small boxes (individual classrooms) except with 80 students.

**Researcher:** This was much like the criticism of early team teaching during the 1960's (Appendix C36 and C37).

**Gary:** Large group classrooms were never intended to be static. We hoped it would provide the teachers with the flexibility to change instructional style and student groupings. We were working on this concern as the lobby group came forward and by the end of the year were being quite successful but it was too late.

As for student numbers, well, the reality was we had a certain number of grade six students entering grade seven, so we had to divide them equally. In the case of the third year we had 160 students, a larger bubble than normal, thus 80 in a class. Not ideal, but reality. Our thoughts from the beginning were that 75 (three times an average class of 25 students) would be our working number.

**More work.**

**Researcher:** Another issue that most teachers mentioned was the increase in workload resulting from evaluating student work several times to encourage a quality standard and lesson planning in a team format. This was greater than had previously been experienced while teaching in an individual classroom. Teams tended to meet more on off-hours and weekends, which added to the time on the job and, ultimately, some stress.

**Gary:** That certainly was true. I have never in my 20 years of experience in junior high schools observed teachers work so hard and be so committed, spending many hours planning. The concentration on quality student work, influenced by OBE, increased the evaluation load of every teacher as in some cases they assessed a student’s work multiple times. Some teams even did their field trips and tutorials on Fridays off. This was their day off but they chose to provide
opportunities for students. The commitment to portfolios, progress reports and SLPTC also added many hours to their workload. In the past a marked report card was all that was needed.

**Researcher:** Here is an example of the teachers going above and beyond the call of duty, adding more work to their schedule.

**Bud T:** So every Friday Off57; one of us is here [at school]. We told that to the parents, we told that to the kids, “If you need extra help, here’s a day.” I know it’s our day off, but we’re giving up our time, so two kids showed up. And then the parents come in and we chat with the parents some more. We talk to the students about their problems. “You did this and this right on the assignment, here’s where you can spend a little more time.” The parents go home knowing what the kid has to work on (TB1p. 16).

**Alice T:** I think the workload is different. I don’t think it’s more. I feel like it’s an investment of time that is much more meaningful in large group. You see the results of your invested time (TA1p. 19).

**Researcher:** One teacher talked about the logistical work of just keeping the large classroom organized and on task.

**Charlie T:** I guess the whole notion of this large group includes so many logistical concerns or things that must be thought through, worked through, and organized and systematized. You are sometimes caught up in so many organizational issues that you can get tired (GABCp. 34).

**Researcher:** Charlie also mentioned the stress from the emotional involvement of the long-term relationship. It could also be draining. This was mentioned in the research as a possible disadvantage (Appendix C35).

**Gary:** I also noticed that after the first year in which many of the procedures and the routine of the large classroom became second nature to the students as well as the teachers, the workload began to diminish. However, teaching does require a lot of work crammed into shorter time spans, that’s the nature of the school year. Busy in September, quiet for awhile, then exams, reports, parent meeting in November, another lull, repeated again in March and again in June. There is a natural ebb and flow in most teaching situations. As well, teachers deal with stress

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57 The schools in Edson had developed a modified school year that by increasing the minutes in a school day resulted in having every other Friday off.
differently, influenced by their emotional patterns and personality. The same was true with large group teams. Some went along without as much stress as others were experiencing.

**Researcher:** Generally, even though it was mentioned by most of the teachers, the hard work was not considered a major difficulty. In fact, there seemed to be a satisfaction that the hard work and longer hours went to a good purpose. The teachers were able to see that their efforts were affecting their students in positive ways. These successes and their feelings of efficacy made the work worthwhile.

The disadvantage of team teaching and long-term relationships creating more work was identified in literature (Appendix C26, D31, and E23).

**Relationships between the whole school staff.**

**Researcher:** There seemed to be three areas in which there were difficulties in relationships among staff members. First, there wasn’t enough sharing between teams, “cross-pollination”. There seemed to be a lot of reinventing the wheel.

**Gary:** I certainly can speak to that. It was true, especially at the beginning as each of the new teams came onboard. It may be because they were so busy with their own problems that they didn’t have time to go looking for help. As well, I was away during the second year and my replacement wasn’t as much an advocate as I in terms of seeing the value of the project. And in fairness to him, he had to manage a total school renovation at the same time as we were transforming our organization. So there was a tendency for teams to go looking for their own team flavor, looking outside the school for advice rather than their own colleagues. I was not necessarily a negative thing.

**Researcher:** Here is one teacher’s insight.

**Ike T:** We didn’t have a lot of interaction. Everybody was doing their own thing and forgot about everyone else who was out doing their thing, too. We never did sit down as a group and say, “Hey how’s it going? What are you having difficulties with and how can we help you?” (TI1p. 24)

Rarely did anyone come to us and ask, “Well, how did you handle this? Or how did you handle that?” Yet we’d gone through the whole thing several times and come up with some reasonable ideas on how to deal with them (TI1p. 10).

**Gary:** This was true, but we were starting to pull it together, work together, when the lobby group came forward with many complains about inconsistent ways of running a large
group classroom. I don't think each team should be a carbon copy of each other. They should have their own character, and they all did. What we needed to do was work out some difficulties in the basic operation of the classroom, for example portfolios, SLPTC, and large group student organization. I had observed after my return from my sabbatical that these areas really needed to be addressed but the lobby group used then to their own advantage as part of discrediting large group.

**Researcher:** The second thing that was mentioned was a kind of backlash from the teachers who did not want to be involved in team teaching and, possibly, from those who did not start for a few years.

**Gary:** Yes, we did have some staff dissension when I returned from sabbatical. Some of it was always there, probably, even while we were planning for the large group project. I felt I had provided the staff with opportunities to express their input into the creation of our vision, but I guess it was not everyone's "cup of tea". I still don't know how I could have done anything differently, even with hindsight. The lobby group was able to use the split in the ranks to their advantage.

**Researcher:** The third issue was that as one teacher said, "We could have given ourselves a little bit more credit." Another teacher stated, "We didn't reward ourselves enough. We talked about that, about not celebrating enough, the fact that we've done a good job."

**Gary:** Again, it is partially true. The Jubilee staff had traditionally known how to celebrate, "how to party," but we seemed to have forgotten as we worked hard on the large group project. So just as we were ready to celebrate, the four months of fighting with the lobby group and with ourselves took its toll on our morale. It wasn't until the next year that we began to come back together as a whole staff and heal some wounds.

**Researcher:** Certainly the literature on team teaching warns against possible rivalries (Appendix C33).

**Team communication.**

**Researcher:** Three teachers working together in one room all day long for three years is not a common occurrence in public education. In my review of the literature, it's not a new idea but it is certainly not mainstream public schooling. In the research on team teaching and their interrelationships, the opportunity for the members to communicate is considered the most essential element for a successful team. This certainly was the case at Jubilee. Although each
team talked about the challenge and hard work to achieve honest and professional communication concerning the operation of the team, none said they had such poor communication that it hindered their teaching. It always seems to be the biggest concern mentioned by someone outside our school, teachers and non-teachers alike. How can it work? Teachers are not trained or ready for working in front of a peer. What happens if they don’t get along? What if their philosophies of teaching and learning are different? All are certainly important questions but, as the Jubilee project and most of the research state, they are kind of a red herring as studies show teachers do get along and do learn to communicate effectively with each other. That they won’t get along tends to be an unfounded fear.

Gary: What we found with our teams is that it certainly can be an issue but not one that cannot be overcome with a professional attitude and commitment to students and colleagues. I also believe the notion of isolated teacher in single classroom is outmoded and we need to transform our view of what constitutes a classroom or a school for that matter. The challenge in working on any team is to communicate about real educational issues as they affect you and before they get on your nerves. Many of us take criticism personally and let our egos get in the way of professional dialogue. I believe that team teaching can help us change that and provide a venue for growth, both professional and personal.

Researcher: The literature indicates the issue of personality conflicts as a possible problem (Appendix C31 and D30). This was considered possible especially since teachers are not trained to work in teams (Appendix C32) and many resist change (Appendix D32).

Other concerns.

Researcher: Here are some other individual thoughts about what the teachers would have done differently next time.

1 Have students more involved in curriculum choice and lesson planning. They were heavily involved in their evaluation and the same needed to be done by involving them in their learning process.

2 All four teams wished they had done more integrated units and individual or small group projects. It is also what the students told me they liked the most about their large group experience, so it would seem to be an area for improvement. Teachers felt the Alberta Education focus on Provincial Achievement Tests had created a situation where their lesson planning became more curriculum driven. This had put a crimp on some of their integrated unit plans but they felt they still could have done more.

3 A few teachers commented that they wished they had provided more enrichment activities for some students, including getting out into the community more. They felt
they had some students who could have benefited from more individualized opportunities.

4 One team felt they needed to do more real “team teaching” where all three were involved in the presentation, instead of “turn teaching”. However, they also felt that they were getting better at it as they came to the end of their first year.

Student and Parent View

Researcher: When students were asked in the interview, “What they liked least?” and “What would they like to see done differently in the large group setting?” they generally told me, “Nothing.” The two exceptions to this response were one student who didn’t care for the portfolio but they liked the student-led conference and another student who mentioned the largeness of the class.

Parents’ responses were similar to students. “Nothing” was the overwhelming response. Their two suggestions for improvement - provide more enrichment and more project work – were the same as the teachers’ reflections. One parent expressed dismay at the way that the lobby group had conducted its campaign for change. Another parent wished we had kept the team of three instead of dropping to two teachers.

Now this overwhelmingly positive picture painted by the parents who were interviewed might seem skewed because these parents had their children in the program. Of course, it might be expected, they would positive. But, then again, how can you knowledgeably comment on the large group classroom unless you had some experience?

Central Office / Board of Trustee View

Researcher: Basically after interviewing the superintendent and two trustees, the main theme of what they thought should have done differently boiled down to being proactive at all levels the board, central office, and the school. They felt they should have been more involved in selling the program, getting the good news out to the community. They needed to have a PR program, continually educating parents. The superintendent summarizes.

Super: We need to reserve energy and money and strategies to talk about that. We need to continue to go to feeder schools. We need to work in a proactive way, not reacting when they [pressure groups] want a meeting. But rather we need to go out and bring constant evidence or even other people, people who later on could give testimony (SUPp. 12).
Researcher: The Trustees mentioned that they should have evaluated the program more and should have provided choice for parents. One other factor was brought out about what could have been done differently. It has to do with you Gary.

Gary: I know. My role in the creation and demise of the large group project is significant. I have done a lot of soul searching over the last few years but, again, what’s done is done. What did the superintendent say, as if I don’t already know?

Super: Well, I would say this about you, the principal. Not only did you succeed in bringing about just one extremely exciting project, one that is not only educationally sound but also extremely difficult to implement with a relatively large staff. That in itself is a giant accomplishment. And so you have a lot to be proud of at achieving that, but I think you owned it too much, you should have let go a little bit. By that I mean, when the public, for example, raised some questions about it, some call it defensive, but I’m not sure I would describe it necessarily as defensive. I would say maybe you had such a strong ownership of it, that maybe you couldn’t step back sometimes, and say “That’s a good point, and maybe we could incorporate it without destroying the structure” (SUPp. 13).

Gary: I see that in hindsight. I will have more to say about this in the final Chapter.

Conclusion

Researcher: In the end, the participants interviewed seemed to consider their three-year journey into the large group classroom experience an excellent adventure, and beneficial. There seemed to be a closer bond between them than they had experienced in previous schooling situations. The changes in the structure and organization of the school brought about movement of teachers toward initiating more practices such as integrated curriculum, student involvement in their evaluation, a variety of student groupings, individualization of programs, and community connections. There tended to be a transformation toward more caring and bonding between all participants. Chapter Six will expand on these observations.
Chapter 6 – Last Word (Postscript)

Introduction

After crafting the narrative analysis, the Jubilee Story in Chapter Four, and the dialogue of Chapter Five, I wondered how I could bring some closure to the end of an exciting episode in the history of Jubilee School, while still portraying the hope and promise the participants expressed. So how can I conclude this story with a look to the future?

I decided that the best way was to allow each of the characters, including the principal, an opportunity to reflect on their experience. As the researcher, I will conclude with a meta-reflection. It is a conversation between the principal and the researcher, which centers on the following topics: the Research Questions, the Research Process, and the Implications of the Research. I will summarize with some speculation on the implications for school communities, and for further research. Some might question the value of including the principal’s comments but, as Eisner indicates, there is value in “connoisseurship”, which is a combination of experience and critique. During the dialogue I use critical questioning to help reveal the principals’ perspective as a participant and advocate. As Grumet (1991) states, “Our stories are the masks through which we can be seen, and with every telling we stop the flood and swirl of thought so someone can get a glimpse of us, and maybe catch us if they can” (p. 69). Here is a glimpse of those masks.

Research Questions

Researcher: Are you ready to discuss this project at Jubilee School that you have been involved with for the last eight years?

Gary: Yes, although I have had so many discussions with so many participants, interested educators and community members that I sometimes think that I am repeating my self over and over again.

Question One

Researcher: Well here goes. Question 1 – “How has this new teaching experience changed teachers educational philosophy about ‘What’s important?’”
Gary: From the point of view of the principal of the school, I saw incredible professional growth and commitment. The courage displayed by the teachers was phenomenal. Each team proceeded into the virtually unknown territory of teaching in front of peers and working with students all day for three years.

Researcher: That’s a pretty glowing report. How can you substantiate it? Why should the reader believe you?

Gary: Well, first I have over twenty years of experience in teaching in junior high classrooms, half of which were spent as an administrator visiting many different classrooms. In addition, I have the vantagepoint of having been both principal of Jubilee for eight years and having previous experience in three other junior high schools. My comparison of the team members’ growth and change in education philosophy comes from this perspective. Specifically, I saw teachers working to develop lessons that were integrated, and student evaluation systems that provided students and parents with more than just marks and that involved them in the student’s evaluation process. I saw teachers committed to students for three years. They didn’t want to lose these students and would take the extra time to work with them and their parents. Teams spent longer than normal hours working to develop routines, lessons, and plans to help their student learn and develop as young community members. The team handled its own student discipline much more effectively than the former vice principal and I could ever have.

Researcher: Maybe that is because you didn’t do an effective job of disciplining the students?

Gary: I must admit that is somewhat true, but I think it has more to do with the relationship the team could develop with the student and the parent over the three years. As an administrator, I had a limited relationship with students. In many cases I didn’t know the student that was sent to the office by a teacher, yet I was to help bring about a solution for the student, teacher, and parent. That system did not work well very often. Add to this the fact that many students sent to the office would sit there until an administrator was free to deal with them. That could mean a substantial loss of class time. The large group with three teachers could usually handle the problem immediately and have the student back into the class without disturbing the remainder of their classmates. One other advantage was that the teachers’ conversations in the teams were about students and curriculum. They were discussing their pedagogy, not always the case in discussions of teachers from traditional single classrooms, who do not have the same
common ground or experiences that the large group teachers had as a result of intimate daily contact.

Researchers: I must agree with you. In my official classroom observations and numerous interviews I observed teachers committed to their students and their craft. They demonstrated a commitment to an educational philosophy that you and the staff had espoused in your team teaching project. In Chapter Five, the teachers spoke very adamantly about the strength of the large group classroom. For teachers it was the strength that team teaching provided them in both the delivery of curriculum and the relationships developed. The team teaching and the three-year relationship allowed for flexible and creative lessons. The daily classroom routine was under their control. Planning was easier because the three teachers had the same daily experience and thus the continuity provided for both lessons and student observation was constant. Because of the daily interaction they could arrange students into multiple groupings, from large groups for community type events such as celebrations, class discussions, and presentations; to smaller groups for tutorials or skill level development, and group work. Finally this led to the development of individual student programming based on that student’s remedial needs and including such things as work-studies, literacy programs, and one to one discussions. Student evaluation was holistic as three teachers developed profiles of the students’ skills and could coordinate the development of portfolios and schedule student-led parent teacher conferences much more easily. They all could be present at the conference without complicated scheduling problems. Teachers saw students becoming accountable and taking responsibility for their behavior and learning.

The teachers experienced the personal and professional support of a team. A real sense of a team, working side by side as equals. Not only could they learn from each other about teaching and classroom management strategies, they also could share subject area specialties, and student evaluative and remedial techniques. As one teacher put it, being able to teach and assist a colleague was as important to his feelings of satisfaction about his teaching as was learning from his team members. The rapport developed between them allowed for risk-taking and a space for reflective practice. Honest, open communication was considered the greatest challenge to their team. But even as team communication was the most difficult challenge [and not letting one’s ego interfere in their professional discussions] it was also the most rewarding.
Gary: Yes, all of the teachers who experienced the team teaching told me that not only had they learned more from this than any other professional experience, but that they would do it again. All twelve had at least two years experience, and three worked on two different teams. Even the teachers who could not continue after the year that the lobby group demanded a compromise were disappointed. In fact, some were upset with me for not picking them for one of the three teams that did continue.

Researcher: The teachers came to believe that relationships were crucial. Relationships take time, which is not as easily found in traditional junior high school schedules. The relationships developed between parent and teacher, student and teacher, and between team members are what have made the process of learning significant and transformational.

Question Two

Researcher: The second research question included a consideration of the students and parents, “Will students and parents see the changes in the same light as the educators?” Let’s deal with students first.

Gary: I saw three distinct groups of students. First there were the ones who experienced the full three years. These students enjoyed their experience and found that it provided them a safe place and allowed them to take risks. Then there was a second group who really didn’t take their studies very seriously and wanted to have a “junior high” experience which included “fun”. After discovering that the large group situation didn’t allow them to move around to a number of isolated teachers, their behavior was monitored and they were held responsible for it, they didn’t like it. So these students convinced their parents to allow them to withdraw using such excuses as, “The classroom was too noisy” or “they weren’t getting the help they felt they needed.” Many of these parents took the word of their child on its own. They seldom came into the school to investigate and, after the lobby group, they believed everything they had read in the newspaper. The third group were those that didn’t experience the large group classroom because their parents chose not to enroll them.

Researcher: What about the concern of the noise and “getting lost” in the large group concern?

Gary: First of all junior high schools are a little noisier than elementary schools. I have taught for approximately twenty years at the junior high, let me tell you these students are more
active and louder because they are growing. It doesn’t mean that they are not engaged in their learning, it’s just that they are more social. In my observations of both large and small group classrooms, I would have to say that the large group was not any noisier than the small and, in fact, as they progressed through the three years together, the noise level was reduced as their relationships, and classroom routines became stronger. As for getting lost in the large group, that was a red herring that the lobby group used. In the traditional system as has been described, students moved from classroom to classroom, teacher to teacher, every 50 minutes. This is an environment where you truly get lost in the shuffle. In the large group, yes there were more students, but also three sets of eyes working together daily over an extended period to develop a holistic view of each and every student. Time was now a beneficial factor rather than a limiting one.

**Researcher:** The interviews of nine students indicate a general feeling that they really enjoyed their three years. None felt that they missed anything by not having a traditional “junior high” education. They stated that they developed a close bond with both their teachers and their classmates. They talked fondly of the safe and comfortable environment. They enjoyed the project work and classroom discussions. They felt that with supportive friends in the classroom and the practice of making presentations in front of the large audience in the classroom they developed confidence. They all mentioned the project work, that included practical exercises, as being very helpful in preparation for high school and living on their own. Students had mixed feelings about the portfolios and student-led conferences. Most saw them as valuable but a few still wished to have marks.

**Gary:** Yes, students have been acculturated to see marks as the best way to determine success or signify attainment of knowledge, and many followed their parents lead. I believe that the students, particularly those who are having difficulties academically or emotionally or both truly benefited from the large group format. This classroom format allowed teachers to develop a program over a three-year period rather than the year by year process of the single classroom. The high achievers could also benefit if they wished to challenge themselves. In fact, I believe that the parents of the so-called “gifted” students were detrimental to our achieving success. They were looking to have their children get high grades so they could go on to university. However, as a school we needed to deal with all students, not just the “bright” ones, so we saw the program
as benefiting all levels of students and providing the mechanism to develop individualized programs.

**Researcher:** Students saw their teachers as not only friends but also being demanding enough to challenge them to improve and grow both academically and personally. In fact, there were a number of stories of students returning to visit the teachers at Jubilee. One teacher even invited the whole class to her wedding in the summer and 28 students attended. Here are two more examples of the bonding of the students to their teachers.

"Even now I see or hear from many of my Ex-CALM students. Some drop by at the school to say a quick "Hello", while others have come and talked to me for at least an hour (even this year, three years later). As well, I see many around town and we usually stop and chat for awhile. I still feel a strong bond with those students who are now young adults."

"The SOAR class invited us to attend their Grade Twelve Graduation this past June. We not only received formal invitations, (not by our doing) but we were seated at the head table during the dinner. Not even the high school teachers got to sit there. That is how powerful our relationship with those kids is. Some parents commented that we didn’t belong there, but they were parents of the kids who were not in the SOAR class. It was the best closure to this project that we could have asked for. I will never see that kind of relationship again.

**Researcher:** Let’s talk about how the parents saw the changes.

**Gary:** Those parents that stuck with it for the three years were delighted with the climate of the classroom and the commitment of the teachers. They liked the safe and caring classroom. However, there were the parents of the lobby group who saw nothing but negativity from the project. In fact they would never talk to any of us, “one on one”. All these conversations were more akin to arguments. They would occur in public, town hall type meetings or I would read parents’ opinions in the letters to the editor section of the newspaper. I still have negative feelings even now, four years later, when I recall those four months.

**Researcher:** That must have colored your thinking of the project?

**Gary:** Yes, after many months of reflection and soul searching I certainly was on the defensive after the lobby group got involved. I felt the team members and I were being attacked personally and, in fact, I was verbally attacked. I was an advocate of this transformation of a dysfunctional system, the “junior” high school, and I saw a great deal of potential in our project not only for the students and parents but also for the teachers. For the first time in my career I
saw that by changing the structure of a school we provided the opportunity for teachers to control their working reality and allowed them to deal with any problem set before them. It truly was collaborative action research as an ongoing process, built into the team, so to speak. I also saw the potential for peer coaching for both supervision and professional growth. So, when it was being attacked I became the defender of it. I was prepared to be a martyr; I would “die on the hill,” so to speak. In addition the lobby group was passing half-truths and some lies around and not allowing us to refute their comments. This became quite frustrating. I hoped that we could sit down and deal with their concerns and problem-solve together, much as had happened in SOAR, CALM and TEAM, the first three teams, but it did not come to pass.

**Researcher:** But the lobby group did have some legitimate concerns?

**Gary:** Yes and no. Many of the problems or concerns were ones that had been observed in the early months of the third group of teams, ORCA and RIGHT. In fact, by the time the lobby group held its first public meeting in January, the teams had already dealt with many of the stories and issues. But these earlier problems were cited by the lobby group anyway. As a staff we were continuously working at consolidating our efforts and getting the teams together to share notes and build on the experiences of others. But as time moved on, both sides became more and more emotional which lead to arguments rather than dialogue. It became very personal on both sides. At Jubilee we had taken on the bunker mentality as we received shots from all quarters.

**Researcher:** Didn’t the supporters of the program come forward?

**Gary:** Some did, at first. The School Council chairperson, a volunteer, was verbally attacked when she came forward: to her credit, she stuck it out to the end. In fact she went to the lobby group the next year to encourage them to join the council but they did not take up her invitation. A few advocates, including teachers, stood up in public meetings to defend the program, but they were generally attacked by numerous people in the large crowds that attended during this period of turmoil. I came to hate going to those meetings. They were so stressful and the atmosphere was mean and angry. In the end, it turned out that the lobby group supporters mostly wanted the return to marks, which was only part of the large group project. They wanted choice and marks. Once they got what they wanted, they disappeared, as into the fog.

**Researcher:** Well, I interviewed seven parents and they all were very supportive and positive about the whole program. Of course, this is to be expected as they chose to have their
child in the program. However, they also had at least two years of experience to draw their opinions from, which wasn’t the case with the parents of the lobby group. The participants interviewed mentioned the flexibility of the program and the extra help and support that their child received from the teachers. All mentioned the great communication that they received from the teachers regarding their child’s academic program and classroom behavior. They liked the portfolios and the student-led conferences and indicated that the progress reports given by the teachers were in-depth and insightful. Parents felt that the teachers were truly supporters of their children and felt the teachers’ commitment to pedagogy. They also mentioned the benefits of the three-year continuity and the development of a safe and caring classroom. Each felt comfortable in visiting the classroom or telephoning at any time. Finally, at least half of those interviewed expressed disappointment that the program was not continuing as they had younger children that were coming up through the grades. One parent also hoped it would have extended to the high school. To conclude, I would say that most teachers, students, and parents all saw the large group classroom, in a similar light. They were all delighted with the caring relationship that developed.

**Question Three**

**Researcher:** The next question, “To what extent can a ‘reflective culture’ be established to replace the educational leader?” This was one area on which I did not receive much feedback during the interviews or classroom observations. However, I think the principal has some insights.

**Gary:** Yes, I do have some thoughts on this subject. Our project really developed out of the BATPIG program, the ongoing school based collaborative professional development initiative. As it turned out, our large group project was an extension of this work. We came to understand that the BATPIG project, although helpful and somewhat successful, didn’t go far enough. We saw the need to do “BATPIG”, everyday, all day long, not as a number of meetings that you tried to fit into your busy school day. Later, when the school division began to restructure the administrative hierarchy, we saw the team structure as the ticket to accomplishing this directive. We would have a team leader from each group of three teachers on an administrative team with the principal. We even played with the idea that the principal in fact would be chosen from within the staff, by the staff, so that the position could rotate among the
staff. We saw this as the next step in developing a truly reflective culture to replace the hierarchical leadership of traditional schools.

**Researcher:** How did it work out?

**Gary:** Well, as far as it had developed, (and we probably were as close as we could have been), great. We had reached the point where we had five teams with a self-selected leader representing each as a member on the administration team. I thought it worked on a number of different levels. First, the disciplining of students now was undertaken by the teachers who knew the child and their parents over a three-year period. Not only did the quality of disciplinary interventions improve but behavior problems were also reduced. Second, teacher supervision was carried out within the team. The team leader worked with the team members on a daily basis, rather than having the drop-in evaluations of a principal. It was true “ongoing” professional development. Third, the direction of the school was being guided by teachers and the admin. team, rather than them relying on the principal and vice principal. The admin. team would meet every other week to set the agenda for the bi-weekly staff meeting. This tended to streamline the staff meetings and we tended to deal with issues of concern to both the staff and the principal. So I was totally satisfied with the situation and, in fact, during my last two years as principal, we began discussing and planning how we could move to a process of choosing a principal from within the school\(^{58}\).

**Question Four**

**Researcher:** Question Four, “How has the movement toward integrated curriculum changed teachers’ student assessment techniques?” This is also a hard question to address even though these two curricular areas were a central part of the Jubilee large group project. From the interviews and classroom observations I did gain impressions of integrated curriculum and student assessment but little that linked them. I will let the principal address this before I outline my observations.

**Gary:** The connection between the two, integrated curriculum and student assessment, really came as we developed the project. We didn’t go in to it seeing the connection but came upon it as we created and implemented our actual plans and classroom curriculum. Our original

\(^{58}\) It is interesting to note that on my departure two years ago a principal was appointed from within the school.
vision and plans included these two concepts but we didn’t have much in the way of concrete examples that fit our vision. We had come upon OBE after attending an extensive workshop one summer and we felt that this was the closest to our view of having student getting involved with their own evaluation. The OBE concepts of rubrics, student exit outcomes, portfolios and student-led conferences were a natural fit. As a side note, along with the Jubilee teachers there were a few educators from across the school division who attended the OBE summer workshop and they were to influence the direction of the Yellowhead School Division strategic plan and the development of the division wide student exit outcomes. We had wished to integrate subjects and certainly our version of what OBE would involve, rather than conflict with integrating curriculum. I was probably more influential in linking integrated curriculum to student evaluation. I took a course at OISE with Susan Drake and her “transdisciplinary” approach (Drake, 1993, p. 46) certainly came closest to our view of seeing the connection between the two.

**Researcher:** How successful do you think the teams were at integration?

**Gary:** First, I think there were substantially more integrated lessons planned and carried out in the large classroom than in the traditional single classroom at Jubilee. We were also successful on a number of different levels. Let me try to explain. I think the teams were very successful in what I call skill integration. Examples of this would be the transfer of study skills to all subject areas, math skills such as graphing transferred to Science and Social Studies, Language Arts writing skills transferred to all subjects. The reason they were successful was they were in the same room, working on those subjects together, and they conscientiously developed quality work rubrics that were transferable to all student work. They were also successful in transferring these skills to relevant real-life situations. They had the flexibility to use the community as a resource at a moment’s notice. Students could be sent out of the class without disturbing other teachers or students. A classroom telephone was always available to search for answers to questions. Finally, I believe they certainly did a number of units and lessons that would be classified as “multidiscipline” (discipline based) as the three teachers were developing and teaching all the subjects together, so they could see the obvious connections as they went through the curriculum. I believe that each team did at least one project type unit a year. These would resemble the “inter” (across discipline) and “trans” disciplinary (essential learnings) categories (Drake, 1993, p. 46-47), based on themes or generic skills (student exit outcome) not
curricular subjects or goals. However they tended to develop these units based on themes without a lot of input from students. This was not exactly where we wanted to be, but we were actively moving in the right direction.

**Researcher:** That would seem to fit with my understandings of the teachers’ descriptions. They all discussed how they enjoyed the project work when they did it and the students really had a good time. They all believed that the student learning in integrated curriculum was superior to a steady diet of “transmisional” learning (J.P. Miller, 1993a, p. 4). But they all indicated that the demand by the lobby group for marks and the importance placed on Provincial Achievement Exams was a deterrent to their implementation of integrated curriculum.

**Gary:** Certainly that was true. But the “marks” issue was more influential in changing the student evaluation program of portfolios and student-led conferences back to traditional percent report cards. I did hear in a couple of meetings that the lobby group didn’t want to hear about integrated curriculum. They wanted the children in rows, with individual textbooks and teachers doing what they were hired to do, teach, (meaning lecture). So again I see both of them as interconnected. If you integrate, you have to change your evaluation and, if you evaluate differently, you teach differently.

**Researcher:** Overall, teachers were disappointed with their efforts to integrate curriculum and wished they had done more of the “transdisciplinary” approach. They truly felt that students learned more and were engaged in their learning when they did integrate or do project work.

**Question Five**

**Researcher:** “How will the relationships between students, teachers, parents, and community change, if at all?” I believe this has been partially answered in question two but it is so central to the feelings of the participants that it needs to be addressed again.

**Gary:** From the standpoint of the students, teachers and parents who experienced the three-year large group classroom, there was a definite change. A more caring and committed relationship developed. Teachers worked more collaboratively and honestly with colleagues. They committed themselves to developing relevant and rigorous classroom work for their students. They also provided a firm, caring atmosphere for their charges to help these adolescents
through the years of emotional, physical and mental change and growth. Teachers also
communicated much more with parents, and with deeper insights. Students cared more about
their teachers and classmates. They took more responsibility for their behavior and became
accountable for it and their schoolwork. Parents seemed to be more comfortable in
communicating with the teachers. They seem to have appreciated the in-depth knowledge the
teachers had of their child and trusted them to do the best for their students. I saw more parents
visit the school and participate in classroom events and field trips than in any of my previous
experiences. One of the reasons that parents came in more often was a teacher from a team could
spend time with them at any point during the day and the other teachers of the team could ensure
that the classroom continued on without disruption.

**Researcher:** From the research insights I would agree. The time together in an
atmosphere of open communication and common knowledge and experience built a trusting
relationship. This resulted in more caring, commitment, consistency, collaboration, continuity,
and responsibility. Moreover, it resulted in the establishment of a “learning” community. Here
are some of the feelings of the participants in their own words.

1. **Caring.**

**Ike T:** I think these kids know that we care about them. I think they know that. I see
behaviors that aren’t happening because they know us. Some kids are not doing things now that
they would do earlier because they know that it bothers us. And I see that as part of developing
relationships. I think that there are some behaviors that are no longer occurring because of the
fact that they now feel more commitment to us, as we feel to them (GGHIp. 35).

**Charlie T:** These students I’ve not seen with that [don’t care] attitude. That’s quite
interesting actually. We talked about organizing the Grade Nine Farewell⁵⁹ and we were saying
that we were going to have a D.J. dance as opposed to a Much Music dance and many of the kids
were quite concerned because they were intending to come to the dance. I said, “Traditionally,
the Grade 9’s don’t come to the dance, they come to the supper, and they may stay a short time
for the dance and they all take off, they go do their thing”. This group, “Oh, no, we’re going to
stay”. They still feel a connection, which is nice. It’s not something that has been evident over
the last number of years (TC1p. 22-23).

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⁵⁹ The grade nine farewell is the activities that replaced the traditional graduation ceremonies.
SOAR Students: We would like to thank all four teachers for taking us through our grade seven, eight and nine years at Jubilee Junior High School. Their ability to teach took us higher than the grade nine level was supposed to. They not only taught us our core subjects, but also responsibility, and maturity. In our minds they took us into the future, and showed us how to survive. They showed us what it would be like out in the real world. The four of them seemed not only like our teachers but also, in a way, our friends. Thank you for everything you’ve done for us (SOAR Memory Book. 1996).

2. Commitment.

Fern P: I mean myself, I’ve put down about the commitment of the teachers. That might be a very, personal thing, but I feel they are very committed. And when you get teachers like that, I think they do their best for the kids (PFp. 12).

George P: I really like the relationship and the resulting responsibility and commitment of the students and the teachers. I think that is probably the single most positive thing that has existed for my kid, a chance for him to have to accept his responsibility day to day, not be able to avoid it. He would have been a very good one at avoiding it, if he had five, six different teachers. This way they were on top of him and, as a result, I was able to get information very quickly rather than run around all over the place. It was one stop, “How’s it going?” and we kept on top of things. He has really, really improved his work habits and his marks overall as a result and I think he’s now really ready for high school (PGp. 2).

3. Consistency.

Ann P: [I can see] the training in it. The consistency that is developed, all that is developed right there without moving around and because there’s so many different styles and different teachers that your dealing with (PAp. 11).


Charlie T: Overall I think that, the experience is invaluable that’s for sure. We’ve all had opportunities to do [work in] different types of settings, whether it be team teaching, or whatever. This one will always rank as a very incredible opportunity and experience to examine different teaching styles, because you do see the other person in front of a group of individuals. I think you automatically resort to your basic performance when you’re a teacher. Each of us resorts to habits that have been formulated over time. They show the way we are and what we feel comfortable with. Once you see a person [another teacher] in that light, for that length of
time, and under some intense situations, you really do know the individual and you see how they operate and why they’ve chosen teaching and what they are all about (TC2p. 6).

5. Continuity.

Gwen T: The whole issue was one of a student being a whole person but we could see the different parts. I have kids now that don’t do anything in language arts or social because they can’t read, or in mathematics because they can’t count. I guess you can tap into these insights and you get to know them in terms of what type of learner they are. I think in knowing them better you can create alternative things and get kids to learn in ways that would not have happened before.

One student I’m thinking of in particular can’t read. But boy, he has artistic talents. So knowing that, we can tap into it, we can work with what he is capable of doing and maybe have him learn about other things through a different medium. So that is true in getting to know them through all the areas (TG1p. 7).


Ann P: The neat thing I think for my daughter has been that she came to one of her teachers and she said, “These are some of the courses I want to take in Rivers.” Instead of really sitting down with her Mom and Dad, she went to the teacher first and said, “How do you feel I can do?” and then she came to us and said, “Well, okay Mom I feel good about this, I think I can do this”. I know that is part of it, but I would have thought that she would have come to us first. However, she has a good relationship with the teachers and trusts them (PAp. 9-10).

7. Communication.

Researcher: Here is one incident reported about the power of the large group evaluation program that included student-led parent-teacher conferences focused on student portfolios and progress reports to communicate to parents the progress of their child.

Ike T: We set up the interviews and parents came in. We sat down. The kid started talking about what he was doing and the parent literally had tears in her eyes. She was just welled right up. When we asked her what the problem was she said, “It’s the first time since we started school, that when I asked my kid what he was doing, he didn’t say ‘nothing’”. Because this kid now was able to sit down and explain to his mother what it was he was doing, how well he was doing at it and set some goals as to what else he could do. That’s pretty powerful (BxGp. 1).
Researcher: All participants expressed these types of sentiments. In Chapter Five there were abundant examples of these qualities. Here is a parent who sums it up.

George P: I think from the parent's point of view I looked at the continuity that there has been in the program and teachers, the commitment that existed between the students and the teachers, a greater sense of belonging, the opportunity to belong somewhere and, with that, the increased responsibility. Mostly the relationships, student to student, teacher to student, parents to teachers, like all the relationships that are necessary for good education, I thought were the kinds of things that were best addressed for my kid (PGp. 1).

Gary: However, the parents and students of the lobby group had an opposing point of view, totally. The relationship changed to one of distrust and anger. They felt we were trying to ruin their children and use them as “guinea pigs” in our educational experiments.

Researcher: Wasn’t that somewhat true. You were experimenting with a new process, at least in their minds?

Gary: Again, I don’t believe we were experimenting. From our many decades of combined experience in junior high classrooms we were doing what we knew in our hearts and minds was pedagogically sound and in the best interests of our students. Professionally we are entrusted and expected, even mandated, to continually develop our abilities to educate students. This is what we felt we were doing. However, some parents and community members saw it differently. They saw similarities to the “open classrooms” of the 60s and assumed that we were duplicating those "previous mistakes” in what they called experimenting. As well they felt we were using a “canned” program from somewhere else. They did not seem to realize that the program was coming from the very teachers that they trusted the year before but now were untrustworthy. Another influence, I think, on the lobby group’s position was that two former teachers of the school division, who were parents of grade seven students, were co-leaders of the movement against the large group. They both had not worked in a classroom for a number of years and, in their own words, they have very traditional views on education. They became the spokespersons for the group. At this time not only at Jubilee school, but also in the whole school division, educators were involved in discussions about restructuring and transformation. These two ways of thinking would collide in a fight over “isms”. The Conservative provincial government under Ralph Klein was also leading a major overhaul of education. The theme was a tried and true battle cry, “Back to the Basics” and as one headline read, “Readin’, Writin’, ‘n’
Ralph.” As well, at the same time, the superintendent of Edmonton Public Schools stated his belief in the newspaper that we have to do away with “feel good” education. So the members of the lobby group had a lot of ammunition to use, especially in the large town hall meetings where their unsubstantiated comments were made out loud and with no chance of rebuttal

**Researcher:** Isn’t that a little bit of “sour grapes”?  
**Gary:** I guess, but we didn’t get a chance to really discuss what our goals were and I don’t believe we really were given the chance to prove ourselves. We had been able to express ourselves up to that point but, once the “fight” was on, no one was listening, just “shooting from the lip”. In fact, the early observations made by the lobby group of the two new grade seven teams who had only been at it for a few months had changed by the time all of the angry words had been exchanged in public. By spring the two new teams of teachers and parents alike were coming around to seeing the possibilities of the large group classroom, but it was too late. The large group process had a dark shadow of doubt and dislike lingering over it. We began to work on a dual track system, allowing choice.

**Researcher:** Speaking of the dual track school, what was wrong with the concept of giving parents choice?  
**Gary:** Well, the word choice is interesting. It certainly was the buzzword for the lobby group. In the system [traditional] that we had before there was no choice. They sent their children to the school to be educated. We used our best judgment and the traditional junior high style to work with students. Then, as professionals, we came to see that we could educate young people more effectively if we formed teams and developed three-year relationships. We had experienced a change in mindset, a paradigm shift. At that point, some of the parents didn’t agree and so they came out “swinging”. The lobby group was asking us to run a dual track school with one of the tracks being an abandoned line. We spent the next three years trying to do that, run two tracks but, in the end, they were two different philosophies, two different ways of doing things and, thus, two different groups of teachers emerged. In reality, it was two schools going in different directions on different tracks.

**Researcher:** Why didn’t you start a separate school, just for large groups?  
**Gary:** Well that was certainly our first choice. In fact, I did go to the Board of Trustees and ask for a restructuring of the Edson school system. I suggested that instead of four elementary schools and one junior high school, we establish five K to 8 schools. Then we could
work in a school with our large group team teaching philosophy and parents could choose to send their children to this school. This would allow other schools to develop their own unique philosophies. I was asked to discuss it with the elementary principals, which I did, but they would have nothing to do with it. As well, school councils were brought into the conversation but most parents did not want to change the existing setup of elementary grades one to six and junior high seven to nine. We were on our own to work out our vision of our school. In the end, we have moved back toward the traditional model of junior high school. I also think that the "marks issue", discussed in Chapter Five, was an undercurrent that was never really brought to the surface until after all the mudslinging had occurred in public. Accordingly, even when the marks were returned, it was not possible to recover the "bad" name with which the large group had been labeled.

**Researcher:** That would be my read. Parents and students who had experienced large group were in favor, others who had not were against.

**Gary:** I also think there was a little history that we were fighting, that happened prior to my working in the school division. Two major changes had been implemented - the standardization of the elementary report card with elimination of letter grades and the policy of student integration or inclusion. Some parents were not generally happy with these policies. Our project, along with the division's OBE-influenced Strategic Plan, was just another irritation and they were prepared to make this a battle they would win.

**Researcher:** How can you be sure of that?

**Gary:** Well, during many of the heated debates in the town hall meetings, parents would bring these points into the conversation. In one particular situation, I was asked why students entering Grade Seven could not read. I began to provide what I saw as the reason for the situation but was interrupted and basically told I didn't know what I was talking about and I was making excuses. They wanted to know what the board of trustees was doing about it. It just so happened that a board member was in the audience and I turned the question over to him. He was not pleased and, on a later date, told me that he was disappointed that I would get him involved in the controversy. Such were the discussions, based on emotions and past history of which I had only partial knowledge.
**Question Six**

**Researcher:** That leads us to question six, "What kind of culture or ethos will develop in the school community?" This may be a little harder to answer, as the culture of team teaching in a long-term relationship no longer exists in its envisioned form.

**Gary:** That is the case. This discussion is more of a post mortem of the large group situation, although I believe it has metamorphosized into another "culture". The best that I can do is briefly describe my view, having lived in that culture for a couple of years because once the lobby group began to attack the staff the ethos was never the same. However, the two and half years of team teaching that did happen and the two years leading up to it were an exhilarating time for both teachers and parents. We were excited about the possibilities. The central office and board of trustees were also enthusiastic and fully supportive. I think on staff there were a few teachers who did not view the changes we were planning as exciting. In fact I am sure they would have much preferred to keep the status quo. But, as the educational leader and an advocate, I hoped to convince them of the strength of our project by showing them teams in operation. I hoped they would come around. Well it didn't happen as I had hoped and although we worked on collaborative professional development and planning, they remained noncommittal. I would say a few knowingly or unknowingly sabotaged the project, to an extent, by talking in the community.

**Researcher:** Are you blaming them for the development of the lobby group and the end of the large group?

**Gary:** No, there was no one main reason or problem. It was a group of circumstances that came together to bring about the demise of the project. The lobby group was well organized but not interested in problem solving. They wanted traditional classrooms and marks and they exploited any weaknesses they could find and used them in their arguments and presentation. But, we thought we were working with the community and parents. We had spent the first three years including the Jubilee School Council and parents from the elementary schools in our plans but we didn't maintain the same commitment to talk to parents as we got deeper into the project. Unfortunately, parents whose children were in grade four and weren't listening when we started SOAR were interested three years later, while the original parents who were with us at the beginning had moved on to the high school. This three-year turnover of parents required that we continue to educate parents about the large classroom. We fell short on that requirement. Jubilee
School was being renovated at the time of the project and we needed to decide after the first year whether to move ahead full bore rather than only one class at each grade. The structure of the building, an important consideration for establishing large groups, was being changed; we had to decide, and quickly. Also, the OBE initiative and our interpretation of it including doing away with marks, and the historical aspects mentioned above, all developed into the situation that culminated in the reaction of the lobby group. We were not all together on staff and some members aired their dirty laundry in public. We had a crack in our armor that would be exploited by the lobby group.

**Researcher:** So what kind of culture do you believe would have developed if things had gone as planned and as reflected in the first few years of operation?

**Gary:** As I have mentioned before I think it would have created a reflective environment that would have allowed for the evolution of the school and its community. Jubilee had developed a reputation for being a rough place where students were lost and never found again. Of course, this is not true but there were students and families that were experiencing difficulties and their behavior was troublesome, as observed by the community. The activities and incidents of a few students would lead, over time, to a kind of “Jubilee Myth” as a dark and dangerous place. I believe with team teaching and the large group arrangement we had the opportunity to develop relationships among parents, students and teachers that would have spilled out into the community. I think we would have developed a self-renewing ethos that could have dealt with the challenges to education into the new millennium. It had the potential. We could have (re)mythed Jubilee.

**Researcher:** I certainly got that impression from the interviews. I know that the people I interviewed were pro-large group partially because they had experienced it. There was a consistent message from 26 interviewees. They were satisfied with the results and saw room for improvement.

**Intention Statement**

**Researcher:** To conclude this section on researcher questions, we will discuss the intention statement, “I want to discover, with the help of my colleagues, if significantly changing the structure and organization of a junior secondary school will bring about a movement by teachers toward holistic and transformational educational practices.”
Gary: First I would like to discuss what I mean by school structure. It certainly doesn't just mean the architecture of the building, but it encompasses all the underlying structure and organization. It includes: the hierarchy of leadership (principal, assistant principal, teachers, students), schedules, length of classes, bells, semesters and grade levels. It also includes the curricula of Mathematics, Social Studies, Language Arts, Science, etc. Methods of student evaluation such as the use of marks and grades, as well as the understanding that the school is a separate institution from others in the community, or what teachers and learners have their individual and separate roles, are also part of the structure and organization of the school. All are part of the skeleton that supports and forms (or deforms) the educational institution.

Researcher: But were you not just substituting a new structure in the form of team teaching and large group instruction?

Gary: Yes, but this structure attempted to provide flexibility and moved the decisions about what constituted a daily classroom structure and organization to the team of teachers and students. The change toward the large group classroom was our attempt to deal with the problematic features of the traditional single classroom structure as outlined, by Eisner (1988) in Chapter Two. We did change the architectural structure of the classroom by opening up classrooms to create large areas. Each team had a leader that was part of the leadership of the school, namely the administrative team. Teachers were encouraged to integrate subjects and get students involved in the community, and vise versa. Student evaluation was overhauled to eliminate the single percentage mark, which was replaced by a combination of teacher-based evaluation, progress report and a student-based evaluation, portfolio and student-led parent teacher conference. A community of learners was created, with control over their daily life. Our goal was to achieve the most flexible organization possible.

Researcher: Did the teachers change their praxis towards more holistic, global, and transformational forms, the concepts I outlined in Chapter Two?

Gary: Our understanding of holistic, global, and transformational educational practices did not specifically guide the Jubilee project. It started well before these concepts were introduced to me, while I was at OISE and, later, to the staff as I shared my course work with them. We certainly were attempting to create a subject connection through the integration of the traditional subject disciplines. We had already seen the strength of this approach in making learning more exciting and relevant to students. With the OBE work we also were integrating the
skills of students, as outlined in the student exit outcomes. The community connection was one of our main objects. We envisioned a classroom where there was flexibility to go into the community and have it enter the classroom, blurring the boundary between school and community. I believe as a school we were moving in the direction of holistic, global, and transformative education.

In terms of personal and professional transformational work our ongoing site-based collaborative professional development was our attempt at it. A caring and safe environment was central to our vision. Our focus on transformational, social and global issues was not explicitly the focus of the curriculum but did happen as each of the teams developed their path.

I believe that the changes in our structure allowed the teachers involved to change their educational practices. They became more self-reflective, with the help of their teammates. They did more integrating of subjects and skills than before because they planned and taught together. They made more community connections because they had control over their school day and could be flexible. I believe that a more caring ethos permeated the classroom and the relationship between parents, students, and teachers was one of commitment and honest communication. Most participants seemed to be more responsible for their role in the education of students, including the students themselves. I have no doubt that the change in structure allowed this to happen.

Another aspect that I see as very important, one that may not be articulated in the holistic or transformational literature, is that of shared leadership. The team leaders, who were part of the administrative team, took on added responsibility and leadership. They were very capable leaders and went above and beyond the call of duty. Their growth as teachers and educational leaders was exceptional and made the operation of the school much more democratic.

One other area that became extremely effective as a result of their opportunities to be leaders was in the handling of the discipline of students. As these team leaders in the role as administrators got to know the student and parents, their interventions and counseling were based on more intimate knowledge of the background of the student and they were able to provide appropriate assistance. It certainly was more effective than the former "revolving door" discipline that I as principal and vice principal experienced as I dealt with students whom I had not taught and did not know.
Generally, I saw more reflective and collaborative work done by the Jubilee staff members in such a short period of time than in any other school in my twenty-year public education career.

**Researcher:** From the classroom observations and interviews I would agree. Teachers' educational practices certainly grew and transformed, although more in terms of traditional pedagogical approaches rather than in the areas of holistic, global, and transformative curriculum. For example, they did not display a personal intuitive connection *per se* but there was movement toward having students involved in their own evaluation and individualization of their education program that involved some intuitive development. The holistic body-mind connection certainly wasn't evident. The use of meditative practices by teachers and students was limited to creative visualizations. As for the teachers developing into "holistic teachers" with "personal mastery," as outlined in J.P. Miller (1993a), that was not evident. However, I did observe teachers making connections between subjects, students, and community, which resembled holistic approaches. The structural changes seemed to provide a starting point for a team of teachers to reflect on their pedagogy and make transformations for the benefit of themselves and their students. The flexibility of the large group format seems to complement holistic, global, and transformative philosophies and provide a "medium" through which the "message" could grow.

I would like to close this review of the research questions and intention statement with what I feel was a surprise (as Hunt, 1992 suggests we should be open to) in my findings. It is the realization of the critical nature of the development of the long-term relationships. It is so obvious that it is a surprise. Of course the relationship between the teacher and student is important; most educators would say that it is a given. But it was the realization of the importance of having sufficient time to develop the mutual caring relationship and that it was directly related to the structural and organizational changes, that surprised me the most.

**Research Process**

**Researcher:** The following is a discussion on the research process from both the participant and the researcher's point of view. I have at times been challenged by some colleagues who state that, I am less objective than most researchers as I am the principal of the school and an advocate of the project under study. I believe it is no less of an issue for any
researcher. Researchers cannot divide themselves into two. Persons can not stand away from themselves and be objective. As a researcher I am influenced by my non-researcher persona. I have outlined the process I used to deal with the duality of the objectivity / subjectivity stance in Chapter Three. The best I can do is understand this dilemma and take measures to grapple with it. In fact, some researchers view one’s subjectivity as one of the advantages to the qualitative methodology. It provides an added dimension, (an) other vantage point from which to understand teaching and learning.

**Gary**: In this case the fact that I was the principal and participant gave me an insider’s perspective that couldn’t have been captured by an ethnographer from the outside. That does not mean that an outsider’s view would not be a valuable perspective, just different. As Eisner (1988) suggests, a connoisseur’s perspective may be the most valuable for practitioners.

**Researcher**: Nevertheless, as participant and advocate, the principal’s point of view has been articulated throughout the thesis to expose that point of view and allow the reader the opportunity to weigh that in interpreting the narrative analysis. As outlined in Chapter Three, the reader has partial responsibility in evaluating the research. A number of voices were also included in the telling. This, again, was to provide the reader with a wider perspective. As with using a map to find your way, sometimes you must triangulate to locate your position so that you can move on. As researcher and principal it has been a challenge not to let the principal advocate be the main voice of the story. The last two years\(^\text{60}\) have provided me, the researcher, an opportunity to distance myself from Jubilee School. This space has allowed me to draw back and look at the story from a less personal point of view. This final chapter was an attempt to bring out this duality and “come clean”, as it were, with my personal thoughts as the principal of Jubilee School. In addition, the teachers had input, a last word, as I sent them draft copies of Chapters Four and Five for their scrutiny and comment.

One other issue has been brought up in my conversations with peers at OISE and it also came out in my review of the historical research. It relates to the Hawthorne Effect. The theory is that the participants in a research project do better and perceive their efforts as positive because they have been singled out for special attention. In fact one author of team teaching research said, in probably a tongue and cheek way, that if that’s the case maybe we should do research on all

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\(^{60}\) I have been on a leave of absence for almost two years and in fact am no longer the principal of Jubilee Junior High School.
teachers and classrooms. I suspect that the Hawthorne Effect could have possibly affected the teachers' perspectives at the beginning of the three-year experience but the hard work and the challenge of doing a good job led all teams to come down to reality very quickly. It was challenging but rewarding work. In addition, in the middle of the project, almost all teachers were in teams so no one group was more special. The lobby groups' critique of the program and staff at Jubilee certainly dispelled any "special" feelings that may have come from the Hawthorne Effect. Finally it was not until the fourth year of the project that it was decided to formally research the project. Up to that point there were few spotlights on the teams. They worked for their own satisfaction and improvement.

I also need to highlight my attempt to create a narrative analysis. Unlike many life narratives (Connelly and Clandinin, 1988), this one is of a school, a group of teachers, students, and parents. This narrative is the result of teachers working together in the same classroom for three years. It is more of a group reflective practice than an individual reflection. The product of this research is not a verification of some theory or discovery of grounded theory that has appeared from massaging the data. It is a group story, the Jubilee Story, and the subsequent discussion of the effects on its participants. It is not just the stringing of quotations together but the creating of a story from the information gathered in interviews, observations, and collected documents. Narrative knowing is not like paradigmatic or positivistic knowing. It does not create or verify theories but, rather knowledge is created through the story, through the readers' reflections on the narratives and its connection to their lives and thoughts. I have attempted to provide readers a space for them to (re)live their experiences through the Jubilee Story, the narrative analysis. As Schubert (1991) exhorts, we need to record teachers' stories for other practitioners to read. He states, "teachers are not merely studied in an effort to learn about them; indeed, they are invited to share in the creation of knowledge. Put another way, teachers are asked to reveal the experiential knowledge that informs their teaching. Sometimes teachers can communicate this best when asked to relate it directly, and at other times they reveal it through stories about their practical experiences" (p. 207-208).

One last comment, the concept of "voice" in research, I believe, is paramount. I have taken it very seriously in this study, for although my voice as narrator and the researcher who has written this thesis is central to this project, I made a promise to the teachers of Jubilee to tell our collective story, to act as their spokesperson. In writing the narrative I have taken steps to ensure
that they are heard. I have used dialogue, not common in educational research, as a way to let their voices come through and not be hidden or overwhelmed in the summarization and synthesis of the researcher’s voice.

This leads to the last section of this chapter, the Implications of this study.

**Implications – Where to next?**

**For Public School Educators**

**Researcher:** I believe this study is applicable to all levels of public schools even though it is a middle school project. Every school situation is idiosyncratic but the encouraging results from the team-teaching long-term relationship at Jubilee can be useful to other school situations. In fact at the time of the writing of this thesis I know of at least four other similar large-group, team-teaching, long-term projects in Alberta, all started after the Jubilee Project. Two are elementary and have a combined Grade 1 / 2 / 3 classroom with three teachers. I have had the opportunity to visit these classrooms. Another junior high project started after a school team visited Jubilee and we were invited to speak to their staff. Last year they started their own version of a large group, team teaching project. I visited them in the middle of their first year and had a conversation with the principal and the teachers. Here is a brief excerpt of that.

Why did the long-term team teaching project begin at your school?

**Barbara P**61: We don’t have very many kids that fit into our administrative structures that we have created. We try to make students fit the structures instead of creating the kind of structure that they need. I mean our structures have to be built around relationships (BxBp.1-2).

**Researcher:** The principal went on to describe how their junior high had a “revolving door of discipline” problem and very poor student evaluation in the form of report cards which tended to be a poor indicator of students’ skills. She felt that developing long-term relationships would go a long way to help resolve these difficulties.

**Guy T**62: I think we did it to help the students have a place to belong and people to belong to. We built in responsibility that goes with being part of a family, a community sort of situation (BxGp. 2).

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61 This is a pseudonym for the principal of the school that I visited.
62 A pseudonym for one of the team teachers at the school I visited.
Researcher: What have you observed as the successes of team teaching in the large group situation?

Paula T\textsuperscript{63}: I think it is a better way to meet the individual needs of the students. We also seem to have fewer problems because there are two of us to deal with the students and they know that, they’re great. As well, two heads are always better then one. Four hands are always better than two. [With] two people making plans it’s just awesome (BxP. P. 2-4).

Guy T: And we’re not going to hurt kids. If nothing else we’re going to give them more opportunities. We teach them more responsibility and, hopefully, turn them into better students in the long term (BxGp. 6).

I think we have had a lot of successes. I think that our first round of student-led parent conferences were very successful. I think with some ability groupings we’ve been able to bring the kids along a lot more than we, had previously, and so we feel good about some of those kind of successes. Other kinds of successes are the timetable, flexibility and the options we had and just sort of the fun we’ve had with it. Another success is just working with Paula (BxGp. 7).

Barbara P: They work as a team and it’s a real team, not these teams that we try to create artificially with teachers that say, “I will meet with you after school”. This team can meet with you all day long and they are in each other’s world all day long, so now it becomes a real team and the teachers feel so much more connected to each other because teaching [traditionally] is still an isolated profession. We still all go into our rooms, close the door and its our kids and our classroom, We often say, “Oh yeah, well, I’ll get together with the teacher teaching next door to me and talk about curriculum”, but when is it? It’s after school [not always productive] (BxBp. 2).

Researcher: How about parents and students?

Paula T: We have had quite a few parents come in and speak very positively about what’s going on. One in particular, not to mention any names, but I know she was reluctant at first about so many students in one classroom and the noise level, or something like that. The parent came in just the other day and said, “Well, the kids are so happy”. That was her comment, “The kids are so happy”. I said, “We’re happy doing what we’re doing”. We like what we’re doing and it obviously shows in the kids. They like it to. They like being in this situation.

\textsuperscript{63} A pseudonym for the other team teacher.


Guy T: I think that they have been happy with the contact and I think the kids kind of like their classroom. It’s a nice, close environment (BxGp. 5).

Barbara P: The parents have been very supportive. I’m not sure of the exact statistic, but I know they had a really good turnout for their parent teacher conferences (BxBp. 11).

Researcher: Here is a story of that success and commitment of the teachers.

Barbara P: I had one mom that came in and she was adamant, she wanted her kid out and they [teachers] were just devastated. I mean, they knew that it was a good program for the kids, the child, but they were just devastated. I observed as the teacher told the parent all about her child and the Mom just made a 180-degree turn. She just said, “You know my child so well I can’t believe that”. I was getting to the point where I said to the mom, “Fine, actually I want you out of the program because you are not doing good things for our program”. By the end of the conversation she said, “Please let me stay”. And now she is one of our biggest supporters (BxBp. 16).

Researcher: Any challenges?

Paula T: I haven’t seen too many challenges. Probably the biggest challenge is that you have three individuals working together that have never worked together before, but it hasn’t been a major challenge (BxPp. 7).

Barbara P: It’s our administrative structures that we’re making them fit into. Until we break down those administrative structures, were not going to have significant changes (BxPp. 19).

Researcher: All participants saw advantages to the new team teaching structure and saw few challenges other than the reluctance of teachers and parents to change, to try something new. However, they felt that their success would speak for itself and doubters would be convinced. I believe the team teaching and long term relationship classroom (looping), which is not new or unique, as outlined in Chapter Two, does hold promise for all educators. The “fittingness” to other situation is dependent on that situation and the readers’ ability to utilize their understanding of the narrative, the opportunity to have that “Ah ha moment”.

For Non-Educators

Researcher: Although the “fittingness” does not seem as apparent for organizations outside of classrooms, Senge (1994) does indicate that no real learning occurs in an organization
unless it is team learning. Consequently, there is a possibility that this research can inform other organizations that are developing teamwork and are interested in how long-term relationships can be effective in organizational activities. Fittingness to situations outside of schools is more difficult but the narrative nature and dialogue of the research does help to bridge the gap between school organization and other organizations. Again, the reader will have a great deal of responsibility in making connections.

For Participants

Researcher: I believe that all involved have experienced changes in their view of what constitutes "effective" education, and "what is important".

The teachers have seen the professional and personal growth that results from "real" teamwork and the depth of connection with students a three-year relationship can provide. It has profoundly changed what they view as "good" teaching. It has given them a brief glimpse of the possibilities of making changes to the traditional junior high school structure. As for the other aspects of the project, integrated curriculum and authentic student assessment, my observation is that teachers have modified their pedagogy to utilize their experiences and learnings in these areas even though they have returned to a single classroom. Work will be more difficult for them, I think, as the broader educational system moves back to traditional values such as "basic subjects" and standardized tests as a form of accountability. As one teacher told me, she wasn't sure she could be happy back in a single classroom, on her own. However, if the original intent was to develop a reflective culture and if that did occur, then the staff will evolve as they see it necessary to change their working reality to become more effective and caring teachers. If not, then the staff will slip back into more traditional teaching.

I also hope that by receiving and reading my rendition of their story, it will help provide them with affirmation of a job well done and an indication of the courage they displayed in their three-year journey. I hope it will encourage them to continue to seek new areas to change in their evolving careers in teaching.

For the students the experience was very influential. This is demonstrated through the example of the SOAR teachers being invited to their former students' Grade Twelve Graduation. This is not common, as junior high teachers are generally lost in the memories of high school. Students seemed to enjoy their experience and felt it did prepare them for high school. As they
had not experienced the traditional junior high classroom, they may not fully understand any differences. They may in the future, remember the effective nature of the large group situation and it may lead them to ask for changes in public education for their children. It will be difficult to determine, if at all, how they were ultimately influenced.

For the parents involved, on the whole they were extremely satisfied with the school experience of their child. Many were relieved at the relative ease with which their child went through this turbulent adolescent transition. They wished it were available for their younger child. Will it move them to ask the school division to change the school system, or because they are still in the minority, will they accept the status quo? For the parents in the lobby group, it probably verified their belief that educators cannot be trusted to make changes and that the traditional system is working. As many would say, "If it ain't broke, don't fix it".

For Researcher / Participant

Researcher: The implications for Gary Babiuk can be considered in my role as principal and advocate and as researcher.

Gary: As the principal of Jubilee Junior High School for eight years, I have definitely changed my view of what makes an effective and humane school. As they say, "Shift happens!" I have gradually shifted, from a traditional view of education to one that includes holistic and transformational aspects. As I saw the teachers, students and parents work through their three year relationship and experience the resulting commitment and caring, I realized that I could not continue to work in a school environment that was not at least in the process of evolving into a more holistic structure and organization. My particular views of leadership, marks, testing, and subject curriculum changed irrevocably. I saw the need for shared leadership in schools. I believe we need to stop relying on marks and standardized testing and replace them with student generated authentic assessment, and we need to integrate curriculum. My belief that schools must become communities of learners intimately connected to the outside community was also strengthened. I was disappointed by the results at Jubilee, the end of the project, but also encouraged by the attempts to continue some of the initiatives in block timetabling and student assessment. I also see hope as I hear and read about similar projects involving team teaching and long-term relationships in other schools. I will no longer work in a system that does not see the need to change so, in the end, it has changed my career path. I am hoping to work with a team of
educators who are interested in seeing education as a holistic and transformational process and who are actively pursuing connections with the wider community.

**Researcher:** The implications for me as researcher were more of a learning experience. I worked in a research area that interests me, qualitative in general, narrative specifically. I have enjoyed the process of working with classroom teachers and hearing their story. It is an area that I think brings out important insights for practitioners and can be useful in the development of their pedagogy. I certainly am a neophyte in narrative research but this project has gone a long way in helping me improve my skills and my understanding of its power to connect with educators. Readers of drafts of this thesis, public school educators and other teachers, found it an interesting story and one they could relate to on their own level. Along with action research at the school level, narrative analysis will become part of my future work in education.

I have tried to comply with a challenge put forth by Bochner and Ellis (1996) - “Don’t be afraid to make ethnography dangerous, political, and personal. Take risks. Write from the heart as well as the head. Turn the field back on your-self. Turn yourself against canonical stories. Closely examine the production of your texts and theirs. Give respect to empathy and solidarity, but try to hear Others speaking back” (p. 42). I’m not sure if this research is dangerous, but it is political as it flies in the face of the current “conservative” mood in public education. It is definitely personal, as I lived through it as both a participant and researcher and I did risk using a narrative analytic technique, which is certainly not common among educational inquirers. I examined my text, the information shared by my participants, and the reactions of the opposition, the lobby group, in an attempt to hear the “Other” in the story. It will be up to the readers to determine how effective I was.

**For Future Studies**

**Researcher:** What are the implications for future studies? First, I see the need for continued research into the effectiveness of team-teaching and long-term relationships in making schools more humane. During my review of the literature, outlined in Chapter Two, future research was encouraged in these areas. Arhar (1992) states, “Qualitative research needs to be conducted to find out more about the process of building membership through social bonds. Researchers need to get into teams and team-planning sessions to observe teacher interactions during planning time, teacher performances in the classroom, and the processes by which
students become socially bonded" (p. 158). I believe my research has responded to this challenge. I also believe that because this research was conducted in the middle level, similar research still needs to be conducted at other levels of school and, possibly, under other circumstances. George and Shewey (1997) summarize, “The emergence of varieties of long-term teacher-student relationships [LTTSR] in elementary, middle, and high school, combined with the apparently strong positive feelings of participants in those ventures, suggest the existence of a fertile area for future research. In addition to further exploratory studies, research that more precisely describes the outcomes of LTTSR in a number of areas (academic achievement, school climate, personal development of students, and group citizenship) is necessary” (p. 59). I believe that I have contributes to this body of research but I encourage other research in the area of LTTSR.

I was also inspired during my review of the literature on qualitative methodology by the call for the use of narrative to inform practitioners. A number of authors stated that there was a need to provide classroom teachers with more than just statistical research. They suggest narratives that would speak to classroom practitioners in a language that they understood. Narrative accounts can go a long way toward assisting them in improving their pedagogy and, thus, the lives of their students. I hope this thesis will add to the body of narrative research and encourage others to embrace narrative methodology.

**Conclusion**

**Researcher:** “Because of the great professional, personal, and social development of teachers which has taken place in this study it is probably fair to say that the greatest development of teachers comes from a challenge to reorganize the jobs, with an eye to continual and far reaching improvement. When teachers conceive of teaching as a creative art, based upon scientific method and knowledge, they are transformed from routine workers to creative adventurers. This concept of teaching is thrilling in its possibilities. It deals a body blow to the old industrial, factory pattern of school organization” (Giles et al., 1942, p. 307). When the authors of the Eight-Year Report made the above statement almost sixty years ago, I wonder if they would believe that it is still true today. It doesn’t seem that we have moved very far in transforming public schools. They also acknowledged that “…the greatest single obstacle to curriculum reorganization encountered by any faculty was the attitude toward change on the part
of teachers” (p. 307). While this is also true today, it seems that the attitudes of parents and the community now more than ever must be changed as well.

However, I don’t think the story of the death of the project at Jubilee is without hope for, as they say, “Nothing ventured nothing gained”. Those who participated got a glimpse into a world that would not have been possible if we hadn’t tried it. As one of the Jubilee teachers said, “It was a very exciting professional opportunity that can not be duplicated in single isolated classrooms.” The students and parents who participated received a solid education from committed teachers in a caring environment. This level of compassion and commitment, if nothing else, makes the project worthwhile.

Popkewitz (1984) states, “The intent of the research is not just to describe and interpret the dynamics of society, but to consider the ways in which the processes of social formation can be modified. Finally, it posited the social world as one of flux, with complexity, contradiction and human agency” (p. 50). Indeed.

Let me close with the poetic work of one of the teacher participants. It reminds us all to always be ready for the next journey.

Whatever happened to Americo Vespuci

“It’s impossible sir
You’re absolutely mad”

“But my queen tis true
There is land to be had”

“You are young my poor knight
In simple words: a fool
Permission is denied
As long as I rule”

“Come hither ye young men!
Climb aboard, take my hand
We’ll journey o’er the sea
To explore a new land
Fallacy will be conquered
We’ll prove the world wrong
Hoist up the sails men
Underway with a song…!

Make way for her majesty
Make way for the queen
“Sail with my blessing sir
Such courages rare seen”

From Columbus Ohio
To Columbus of Spain
There’s not a wise man among us
But a few who are sane

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Miller, R. (1991a). Some reflections on this Discussion... *Holistic Education Review* (Summer), 49-51.


The Instructor. (1968). This is how we feel as a team. The Instructor (May), 67-72.


White, S. V. (1972). *The Open Area School Achievement or Beginning?* Vancouver: University of British Columbia.


Appendix A
Jubilee School Project - Beliefs Regarding Teaching and Learning

We the teachers of the large group classroom program hold several beliefs about teaching and learning based on our experience with junior high school students. When we began to consider how we could alter our working environment, classroom structure, planning, and teaching strategies to best meet our (our being the students/parents/teachers) needs, the large group classroom was for us the inevitable outcome.

The major beliefs regarding teaching and learning, which motivated us were:

1. Students need to take (and be given) more ownership of their education
2. Parents must be more actively involved in their child’s education (in our experience junior high parent response tended to be much more passive or non-existent when compared to elementary school)
3. What is necessary for effective learning and participation by all stakeholders is the development of a learning community
4. The traditional timetable limited contact with students and did not foster within them a sense of belonging and thus any sense of responsibility to anyone or any place. We want an environment which would allow us to work with a group of students over an extended time
5. Traditional methods of subject delivery tend to render subjects as fragmented bits, which could not be united as whole. Students are often unable to see the connections between subject matter (why would one have to spell correctly in science?)
6. Traditional curriculum overlapped, such that the teaching of a similar concept or skill may be done several times a year. We believe this to be somewhat of a waste of time and resources. Teach the concept or skill, yes, but then utilize time for reinforcement, not re-teaching. We believe that the curriculum should be much more integrated in nature.
7. Students need more time for remediation and enrichment. This was something that was not occurring effectively in our regular classroom because of resources disadvantages. There simply was not enough of time in each period to be effectual in dealing with students’ needs. We realize that we wanted a structure, which would allow for more time and resources to be available for remediation and enrichment.
8. Students need to be more responsible for their work. They should not be able to pick and choose what they will hand in, rather they should be required to hand in everything and that it must meet a predetermined standard which is consistent for all of the teachers
9. We need to make better use of the community. We wish to develop a structure which would allow us timetable flexibility to better utilize community resources and provide more opportunities for job shadows and work placements (things that had traditionally gone only to students at risk)
10. We want an environment where collaborative planning in program development and delivery would occur. We desire the support and feedback regarding our own teaching that would come from a more collaborative setting.

Taken from Thiel (1997), p. 6-7
Rationale / Philosophy

Our experience in Junior High Schools as teachers, parents, and administrators, our monitoring of the current literature on restructuring, and our understanding of the educational situation in Alberta, have lead Andy and I to the conclusion that we need to make fundamental changes in the way junior high schools are organized. The S.O.A.R. (Striving to Obtain Academic Richness) experience is an attempt to address restructuring and will provide us with a working model as we embark on the next three years of our five year plan to organize ourselves and students into a community of learners. It is not our intention to clone the S.O.A.R. group; however, there are a number of fundamental building blocks that we believe must be included in each team’s planning.

Team Teaching

This will provide on-going opportunities for teachers to collaborate in planning, teaching and assessing their performance. In addition, teachers will add to their repertoire of teaching techniques by observing and practicing alternate teaching methods and increase their knowledge in other subject areas as they work together in an open environment. Teachers will model teamwork and cooperation for students instead of dealing with them as a single adult in an individual classroom. It will provide opportunities to introduce cooperative learning, which will allow students the opportunity to take responsibility for monitoring and encouraging the successful operation of their own group. There is also the natural day-to-day support that each teacher can give to the others. We believe that the team approach will allow for the development of individualized programs for students as one teacher can work with individual students or small groups while the rest of the class is still under supervision of one or two of the other teachers.

The fact that a team of teachers will work with students for three years will allow students to progress at their own rate and provide an opportunity for continuous progress to be
implemented. The continuity of the class and lessons is more likely to occur as substitute
teachers or change in personnel will not totally alter the team.

It needs to be emphasized that the three teachers are the teachers of all the students in the
class. Teams should refrain from dividing the class into three separate groups on a permanent
basis and teaching their individual subject areas to individual groups. This would resemble the
former “open area” school concept and is not acceptable.

Interdisciplinary Curriculum

The second building block is the development of interdisciplinary curriculum. We have
observed the power of being able to relate skills and knowledge across traditional subject areas
and into daily life experiences. Demonstrating the integrated nature of knowledge tends to help
students see the relevance of what they are learning. This is a much more life-based approach, as
our society does not operate in single subject areas (ie. math, science). Please refer to the Mission
Statement of the Yellowhead Strategic Plan. The expectation is that as much as possible, the
program should be inter-disciplinary, bases on themes or foci. Separate, individual skill lessons
will obviously still be necessary.

Results Based Student Evaluation

To put it simply — “no marks”. Student progress should be monitored using a number of
diagnostic and assessment tools. The philosophy “that when a student learns is not as important
as whether they learn” is our guide. It is important to remember that the move toward outcome or
results based education is outlined in the Yellowhead School Division Strategic Plan and
encouraged by the Department of Education. An integral part of the idea of outcomes includes
the use of authentic assessment strategies including student portfolios. The S.O.A.R. group and
the schools we know that use student portfolios (Mountain View School in Hinton and Bisset
School in Edmonton) have found them to be an excellent tool in assessing students. Part of the
process of portfolios is the development of student-lead parent/teacher interviews. The S.O.A.R.
group has found this to be the most powerful change in student behavior that they have observed
to date.
One last word about student assessment and achievement. We will borrow from a talk given by Allan November at the 1994 Teachers’ Convention in which he stated the two major mistakes that some educators are currently making and need to solve are, first, we need to encourage and provide for the development of more student interrelationships in order that they may share knowledge and ideas between fellow students, teachers, parents and community members. Second, we need to encourage and develop true student creativity, not just the memorization and regurgitation of prescribed information.

Parent / Community Involvement

This can no longer be a token effort as has typically happened in the past. Each team has a responsibility to invite parent involvement in their classroom, in meaningful ways such as having parents work as teacher-aides, tutors, or provide student, phoning and other administrative support. Parents need to be invited constantly and welcomed at all times to observe and hopefully become involved in the daily classroom activities. Other community members need to also become part of the “community” of the class. A telephone in each classroom is no longer an option but a necessary educational tool. A parent newsletter has been found to be very useful by the S.O.A.R. group. Part of the involvement in the community includes students moving out into work placement, job shadowing and volunteer situations.

Conclusion

Teams should remember that this reorganization is “a process, not an event”. It is a long term, ongoing process, and not just a five years project. As our superintendent is apt to say, “when there seems to be conflicts or crises, we are in a growing situation”. Thus, if we work together in our teams, support each other as a team, and involve parents and students in our decisions we will go a long way in developing a community that can deal with the critical educational and societal issues that we now face and will face in the future. Thus, Andy and I see us evolving into an educational community and a “learning” organization.

Finally, and again utilizing Allen November’s ideas, he stated the philosophy that we need to follow in order to deal with our educational concerns is as follows:
First, teachers need to honor the wisdom of other teachers,
Second, teachers need to honor the wisdom of students,
Third, schools need to honor the wisdom of the community,
and if the above are followed the community will honor the wisdom of the school.
Food for thought!

Footnote

A recurring statement broadcast by the media and made by the public, business, universities that, "many students are leaving our school system who cannot read, write or know basic math" is constantly being used as a criticism of public education. We believe literacy and numeracy may in fact be the first priority of our school. Thus if students can't read or write or perform basic math skills by the time they reach Grade 7, we may need to consider concentrating on these skills first before any others. We need to address this issue as a total school.
Appendix C

Advantages and Disadvantages of Team Teaching
1950's to 1970's

Advantages

Economic
1. Use of teacher aides with qualified teachers increases the work force: Bair and Woodward (1964), Freeman (1969), Polos (1965)
3. Teacher absenteeism doesn’t effect lesson: Polos (1965)

Student
5. Better adjusted: Polos (1965)

Teacher
15. Planning time during the school day: Hanslovsky et al. (1969), Heller (1967), Polos (1965)
Curricular
17. Improved diagnostic / planning / evaluation procedures: Blair and Woodward (1964), Hanslovsky et al. (1969)

Organizational
22. Involvement of other staff members such as counselors and librarians in classroom teams: Hanslovsky et al. (1969), Heller (1967), Polos (1965)
23. Use of large and small groups and individual study: Polos (1965)

Disadvantages
Economic
27. Need for more equipment for large group instruction and school renovations: Freeman (1969), Polos (1965)

Student
28. Not all like it or are responsible enough to benefit from it: Freeman (1969), Polos (1965)
29. Have less time and relationship with large group teacher: Freeman (1969), Polos (1965)
30. Increased competition in large group: Hanslovsky et al. (1969)

Teacher
32. Not trained to team teach: Freeman (1969), Polos (1965)
33. Rivalries will develop on staff: Freeman (1969)
34. Reduction in professionalism by overuse of aides: Freeman (1969)
35. Exhaustion by constant interaction with peers: Hanslovsky et al. (1969)

Curricular
36. Large group lecture hard to control / teach / and for students to follow: Freeman (1969), Polos (1965)
37. Large group lecturing used to much: Polos (1965)
38. Not research based, “innovation without foundation”: Polos (1965)

Organizational

40. Lack of parental cooperation: Hanslovsky et al. (1969)
41. Minimal understanding of classroom and difficult to supervise by principal; Hanslovsky et al. (1969), Polos (1965)
Appendix D

Advantages and Disadvantages of Team Teaching
1980's and 1990's

Advantages

Economic
1. Reduces staff turnover: Hargreaves et al. (1990)
2. More effective use of equipment, facilities, and staff skills / talents: Hargreaves et al. (1990)

Student
5. Opportunities for independent work and responsibility: Clarke and Clarke (1987)
6. Better able to deal with troubled students: Gallagher-Polite et al. (1996)

Teacher
12. Professional autonomy and decision making: Clarke and Clarke (1987)
16. Share power with students and become advocates for them: George and Alexander (1993)
Curricular
17. Facilitates individualized instruction, better sequencing, pacing and continuity: Hargreaves et al. (1990)
18. Coordination of content areas leads to creativity and critical thinking: Donaldson and Sanderson (1996), Valentine et al. (1993),
21. Facilitates integration of other middle level programs such as advisory groups: Mason (1995)

Organizational
23. Decision making shared, better relations between admin and teachers: Erb (1987)
25. Improved communication between all involved (teachers, students, parents, administration) which leads to operation consistency and stability: Erb (1987)
29. Easier transition between elementary school and high school: Mason (1995)

Disadvantages

Economic - none found

Student - none found

Teacher
32. Some teachers resist change brought with teaming: Clarke and Clarke (1987)

Curricular
34. No training in team teaching and human relations: Clarke and Clarke (1987), MacIver (1990)

Organizational
35. Less flexibility in master schedule: MacIver (1990)
Appendix E

Advantages and Disadvantages of Long-Term Teacher-Student Relationships (Looping)

Advantages

Economic – none found

Student

1. The Advisory Role – more authentic caring as teachers become more aware of students' personal lives and the teachers become role model: George and Shewey (1997), George et al. (1987), North (1987)
2. Group Involvement and Community – students identify with the team and take team related activities seriously and a team spirit and pride is developed: Arhar (1992), George and Alexander (1993), George and Shewey (1997), Kasak (1998), North (1987)
4. Achievement – increased achievement for less successful students and teachers create long range goals for student achievement: George and Alexander (1993), George and Shewey (1997), George et al. (1987)
5. Reduction of dropout rate and improvement of attendance, more success with dealing with “kids at risk”: Arhar (1992), Grant et al. (1996), Haslinger et al. (1996), Rasmussen (1998)
7. Students accountable for their actions and develop social skills necessary to resolve conflicts: Hanson (1995), Lincoln (1997), North (1987)

Teacher

8. Classroom Management – teachers trust students more which leads to positive approaches and reduction of the classroom management necessary as students matured: George and Alexander (1993), George and Shewey (1997), George et al. (1987), Lincoln (1997)
10. Diagnosis – teachers share common observations and knowledge about each student and are encouraged to contact parents and solicit help for students: George and

11. Teacher-Teacher relationships, loyalty to team and a higher level of cooperation and tolerance especially of new teachers: George and Shewey (1997), George et al. (1987)


Curricular


15. Allows for consistency of expectations from all sides and an opportunity to address developmental diversity of adolescents: Kommer (1999)

Organizational


18. Curriculum and student viewed holistically: Grant et al. (1996)

Disadvantages

Economic - none found

Student

19. Anxiety created for both teachers and students as they separate from each other at the end of a cycle: Grant et al. (1996), Hanson (1995)

20. Putting up with "bad teacher": Rasmussen (1998)


Teacher

22. Worry about difficult parents: Grant and Johnson (1995)

23. Resent learning the curriculum for more then on grade level: Grant et al. (1996)
Curricular

24. Halo Effect – strong bonding between teacher and child can sometimes create an atmosphere where a teacher is more forgiving of her student’s academic shortcomings and may delay needed special needs intervention. (Grant et al., 1996, p. 113-114)

Organizational

26. Dysfunctional classroom because of too many high needs students: Rasmussen (1998)
## Appendix F

### Action Research Comparison

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<tr>
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<td>1. Problem Formation</td>
<td>1. Concern</td>
<td>1. Call / Catalyst</td>
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<tr>
<td>6. Researching and Evaluating Anxiety / the Action Plan</td>
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<td>7. Reflecting, Explaining, and Understanding the Action Taken</td>
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<td>8. Recording and Disseminating Results</td>
<td>4. Reporting of Results</td>
<td>5. Joy / Beginning</td>
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Appendix G

Teacher Demographics

The following is a summary of the backgrounds of the teachers' involved in the Jubilee Junior High School large group project. It is provided to give readers a general background of the staff. I will not use names or pseudonyms, as this would compromise their anonymity. The information was current as of June 1999.

<table>
<thead>
<tr>
<th>Teacher</th>
<th>Years of Teaching Experience</th>
<th>Years involved in the project</th>
<th>Years teaching Jubilee School</th>
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<tbody>
<tr>
<td>1.</td>
<td>13</td>
<td>3</td>
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<td>2.</td>
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<td>10.</td>
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<td>11.</td>
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<td>3</td>
<td>8</td>
</tr>
<tr>
<td>12.</td>
<td>22</td>
<td>3</td>
<td>22</td>
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<tr>
<td>Average</td>
<td>15.8</td>
<td>3.2</td>
<td>13.5</td>
</tr>
</tbody>
</table>
Appendix H

Student / Parent / Teacher Request Letter

June, 1998

Dear

In an effort to learn more about large group instruction from the student [parent / teacher] perspective, I would like to interview you. The purpose of the interview is outlined in the attached Consent Letter. Also attached is a list of the questions that will guide the interview.

If you are willing to be interviewed (and you do have the option to say no), please [have your parents and yourself] sign the consent letter and return it to me so that we can schedule a time for the interview. It should take about 15 minutes. You might want to make some notes of your thoughts on the Question Sheet before the interview.

If you do not wish to participate, that is fine, please let me know so I can ask another student [parent / teacher]. Your participation is totally voluntary

I look forward to receiving your input and comments. Thanks for your participation.

Yours truly,

Gary Babiuk
Principal
Jubilee Junior High School
Appendix I

Adult / Student Consent Letter

Date

Consent Letter

Dear participant,

The purpose of this letter is to obtain your consent to participate in a research project being conducted by myself, Gary Babiuk, a doctoral student at the Ontario Institute for Studies in Education (O.I.S.E.). The nature of the study is to conduct a case study of the changes to programs and organization at Jubilee Junior High School in Edson. The study will include interviews and surveys of teachers, students, parents and community members, as well as classroom observations. The information gathered will then be analyzed and written into a descriptive account of the Jubilee story as part of a thesis.

The purpose of this research project is twofold. First it is one of the requirements for the successful completion of my doctoral program. Second, I believe that working together and discussing the changes made at Jubilee with teachers, students, parents, and community members will assist the whole Jubilee team in making suitable adjustments in order to improve teaching and learning.

Your involvement is crucial in providing a complete and meaningful interpretation of the changes made at Jubilee. Your anonymity is assured as no direct personal reference or use of your name will be made. Your input will be reported in-group comments or unidentified excerpts. All materials, written or recorded, will be kept in a secure place and treated confidentially. Even though I am principal of Jubilee Junior High School, you do have the option of not participating in this project. You are also assured of being allowed to withdraw from the research at any time.

I hope you will consider being part of this exciting project. If you do, please sign the consent below (A copy will be provided to you).

Thank you.

Gary Babiuk

I, ________________, consent to my son / daughter ________________ being a participant in the above-described research project.
I, ________________, consent to being a participant in the above described research project. [STUDENTPART]
Date ___________________________ Signature ___________________________
Appendix J
Guide for Interview Questions

The purpose of these questions is to help teachers [participants] express their thoughts and feelings about their involvement in the project at Jubilee School.

Teachers
1. In terms of the Jubilee project, what aspects of your philosophy of education have changed?
2. What aspects of your teaching practices have changed since the start of the project? b) What aspects have stayed the same?
3. Has your understanding of students' behavior and ways of learning changed? If so, how? b) Have your beliefs in effective student evaluation changed? If so, how?
4. What has been the most difficult aspect of your experiences in the project? b) What has been your most rewarding aspect of your experiences?
5. What or who assisted you in making the changes a reality?
6. What have been your biggest surprises? Your biggest disappointments? b) What has occurred that you expected?
7. In hindsight, what would you do differently?
8. Describe the changes (if any) that you have observed in students, parents, and colleagues.
9. What metaphor would you use to describe your overall experiences over the last (one or two or three) years of working in the team teaching project?

Students
1. How would you describe your classroom?
2. What did you like most about your large group classroom experience? b) What did you like least?
3. If you could change anything, what would it be?
4. How is it different from your elementary school experience? b) How is it the same?
5. How do your parents feel about your work in the classroom? b) Is this a change from your elementary experience? If so, describe what has changed.
6. Any other comments?

Parents
1. In your opinion what educational issues has the large group instruction tried to address?
2. Have you visited the classroom? Describe your experiences.
3. How do you feel about the changes made at Jubilee as a result of large group instruction?
4. How does your child feel about their classroom experiences? b) Is this different from previous school experiences?
5. What do you like most about the classroom? Least?
6. If you could change anything, what would you change first?
7. Why did you choose to have your child in the large group classroom?
8. Any other comments?
Superintendent and Trustee
1. In your opinion what educational issues has the Jubilee project tried to address?
2. How do you feel about the changes that the large group project attempted to make at Jubilee?
3. What has been your involvement?
4. Did you visit any of the large group classrooms? If so, what was your impression observations?
5. What feedback have you received from the public, staff or colleagues?
6. What do you think could have been done differently to have allowed the large group project to have carried on successfully by: a) Teachers? b) Principal? c) Central office administrators? d) Trustees?
7. Any other comments?
Appendix K

Second Interview Letter
[Teachers only]

Date

Dear Teacher,

I would like to thank you again for your valued input and time spent on helping me record the story of large group instruction at Jubilee. Enclosed is a copy of the transcript of our interview dated June 10th, 1997. I invite you to look it over and make any corrections, deletions, or comments (please feel free to write on the transcript). This is a request and your feedback is voluntary but certainly valued and appreciated.

You will notice that the transcript is not perfect. I have made some corrections and clarifications to the typist's first draft. Be assured that any quotes used will be edited to be clear and always anonymous.

After you have had time to read the transcript, I would like to sit down with you in about a week or so and discuss any of your comments. It should take us 10 or 15 minutes. I would also like to discuss your views of large group instruction, one year later. I suggest the following question as a focus but would be interested in any of your thoughts. "Have any of your views on large group instruction changed after a year?"

I have also attached a copy of the original focus questions of our first interview.

I will arrange a meeting date with you in the near future. Thank you again in advance.

Yours truly,

Gary Babiuk
Appendix L

Interview and Observation Schedule

Note: This form of Schedule was used for each of the four teams.

Date

Dear Teachers

The following is a proposed schedule for observations of your class and the subsequent group and individual interviews.

Observations
November 12 - Period 1, 2, 3
November 14 - Period 1, 2, 3
November 19 - Period 1, 2, 3
November 20 - Period 1, 2, 3 (alternate)

Interviews
Group Interview - 4:00 p.m. November 19
- November 21 (alternate)

Individual Interviews
- [teacher name] 4:00 p.m. November 25
- [teacher name] 4:00 p.m. November 26
- [teacher name] 4:00 p.m. November 28

Notes:

1) The above observation dates can be changed if it does not fit your classroom schedule. Please let me know as soon as possible.

2) The individual dates also can be rearranged or switched between individuals.

3) A reminder that if you could keep a small journal of your thoughts of the large group instruction, in particular your reflections on the interview questions I gave you in our first meeting, it would be helpful. This journal is for your reference, I do not wish to collect it, unless you feel it will add to your overall account of your experience in large group instruction.

Gary
Appendix M

Review of Transcript
For Teachers' Second Interview and all other participants’ first interview

Date

Dear Participant,

I would like to thank you again for your valued input and time spent providing your point of view on large group instruction at Jubilee. Enclosed is a copy of the transcript of our interview in June 1998. I invite you to look it over to verify that your ideas and understandings are recorded accurately. Make any corrections, deletions, or comments right on the transcript. There is also space available for comments at the end. This is a request and your feedback is always voluntary but certainly valued and appreciated.

You will notice that our conversation is not in perfect English, as are most oral conversations. However I’m not too concerned about grammar, style and punctuation at this time as you and I am the only reader in this form. Be assured that any quotes used will be edited to be clear and in correct English. As well, any data will be reported under a pseudonym or as group comments to protect anonymity.

After you have had time to read the transcript, please return it to me using the enclosed, self-addressed envelope. Remember you may withdraw from this research at anytime. If you would like to discuss your comments or reflections or have any questions, please feel free to call me collect at 1-416-341-0458.

Thank you again.

Yours truly,

Gary Babiuk
Doctoral Candidate
Ontario Institute for Studies in Education
University of Toronto
Appendix N

Journey Metaphor

1. Call to Adventure
2. Resistance
3. Separation/Ending/Loss
4. Struggle/Anxiety/Conflict
5. Joy/Beginning
6. Return to Service

Germination
Sprouting
Growth

Harvest/Creation of Seeds
Planting of Seeds/Rebirth

From - Drake (1993, p.7)
Appendix O

Story Model

From Drake et al. (1992, p. 12)