

A HISTORICAL STUDY OF THE TRANSFORMATION OF  
ROSEWOOD MIDDLE SCHOOL TO EXEMPLARY  
MIDDLE SCHOOL STATUS

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## PREFACE

This study illustrates how a school called Rosewood, designated as a middle school but operating as a junior high school, tried to become an exemplary middle school. This was done on a backdrop of white flight from a city called MetroCity to a city of Edwards, a bedroom community. This study explores the history of how programs came into being and how programs ceased to exist. This study tells the reader about the perceptions of the administrators, teachers, and parents who are associated or were associated with Rosewood.

The events that are recorded really happened and the people really exist. Therefore, the names of places, schools, and individuals have been changed. This was done in order to protect those who wanted to speak freely of the events surrounding the community of Edwards. However, the stories of trials and successes have not been altered.

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## CHAPTER I

### INTRODUCTION

In the past, the curricula of middle schools and junior high schools have been arranged by subject and departments similar to those found in high schools (Clark & Clark, 1994, p. 14). However, three decades ago things began to change. Research on the appropriateness of high school philosophies and practices in the junior highs determined that middle school age students were different than high school students and therefore had different needs (George & Alexander, 1993, p. 2). Based on this discovery, middle school practitioners started to develop a philosophy of their own. Research began to focus on the "in-between-agers" who were no longer considered children but were not yet adolescents (Alexander, Williams, Compton, Hines, Prescott, & Kealy, 1969). For the first time, middle school practitioners created an organizational structure that did not depend on high school or elementary school models, and they initiated their own unique programs specifically designed for pre-adolescents. What has evolved from this process has come to be known as the middle school concept. Also discussed will be the requirements for

a middle school to be considered "exemplary" (see Appendix A: Glossary).

The middle school concept was created with the intent of meeting the unique needs of the "in-between-agers." Schools that maintain and espouse a philosophy that centers on the intellectual, social, emotional, moral, and physical developmental needs of young adolescents may be considered an exemplary middle school. The exemplary middle school is not an award or official designation. The National Middle School Association (NMSA) details the characteristics of an exemplary middle school in its publication, This We Believe: Developmentally Responsive Middle Level Schools (National Middle School Association, 1996). The NMSA asserts that schools which maintain a developmentally appropriate philosophy for young adolescents (ten to fourteen year olds), in conjunction with five key components, may be labeled as exemplary. Five key components demonstrate a school site's dedication to maintaining or achieving exemplary middle school status. These components include interdisciplinary teaming, advisory programs, exploration programs, varied instruction, and transition programs which are explained further in Appendix A (National Middle School Association, 1996).



This study focuses on Rosewood<sup>1</sup> Middle School, located in Edwards<sup>2</sup> a suburb of MetroCity<sup>3</sup>, and traces its transition from junior high concepts and philosophy through the middle school concept to an exemplary middle school. Rosewood Middle School was established in 1976 and operated under the philosophy of a traditional junior high. Through many program changes and philosophical reconstruction, Rosewood now considers itself an exemplary middle school. How then did Rosewood evolve from traditional junior high concepts to exemplary middle school status? This dissertation will attempt to document the process throughout Rosewood's history including views from participants as well as documents. This information is valuable to practitioners in middle schools and junior high schools.

#### Historical Rationale for the Development Of the Middle School

The move to junior highs in the 1920s occurred for some of the same reasons attributed to the creation of the later

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<sup>1</sup>Rosewood is a pseudonym for the middle school studied. The confidentiality of the school site is a condition of the Institution Review Board (IRB) at Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117).

<sup>2</sup>Edwards is a pseudonym for the school site that was studied. Its location remains confidential according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB# ED-98-117).

<sup>3</sup>MetroCity is a pseudonym for the metropolitan city located near the city, which contains Rosewood. The confidentiality of the location is a condition of the IRB at Oklahoma State University, Stillwater, Oklahoma (IRB# ED-98-117).

middle schools. Junior highs were intended to alleviate overcrowding caused by the increased birth rate after World War I as well as improvements in education (George & Alexander, 1993).

The junior high school was undoubtedly intended by its founders early in this century to be a middle school bridging the elementary and high schools. But the junior high school has generally become a school more like the high school. (Alexander et al., 1969)

Donald Eichhorn advocated the national middle school reform movement in 1966 through his publication of The Middle School (1966). It sparked a firestorm of middle school activity (Irvin, 1997). Subsequent middle school publications emphasized developmentally appropriate (see Appendix A) education for children in the middle levels of school. Although developmentally appropriate teaching has been a focus at all levels of education, Stevenson (1992) points out:

While the contemporary middle school movement is seen by many as a recent development, it is in fact the most comprehensive professional response ever made to the long-standing realization and belief of many educators that schooling at this level should be responsive to young adolescents' changing developmental nature. (p. 13)

The developmental needs of the adolescent are the foundation upon which the middle school reform movement established its position. This developmentally appropriate philosophy was refined by the National Middle School Association's position paper titled This We Believe: Developmentally Responsive Middle Level Schools (1995) and offers the term "exemplary

middle school" for schools that self-determine that they meet the association's criteria.

There were several reasons for the development of the middle school, including desegregation (George, 1988). The intent of creating the middle school provided racial integration within the district. Therefore, in response to desegregation, it appears districts redistributed high school populations, closed a few junior high schools and moved the ninth grade to the high schools. Districts have also moved the fifth or sixth grade out of the neighborhood elementary schools and into new middle schools to significantly decrease the amount of segregation in their school systems (George, 1988).

Another reason for the development of the middle schools included responding to changing enrollment patterns (George, 1988). This occurred because of decreased populations at the high school level and increases in the elementary grades. This prompted many districts to redistribute the student population, with sixth grade moving to the middle school and ninth grade to the high school.

There have also been arguments that dissatisfaction with the junior high was the primary rationale for the creation of middle schools with their more developmentally appropriate organization (Alexander et al., 1969; George, 1988). Although not among the original intentions of districts, middle school

advocates for developmentally appropriate education have taken the initiative that desegregation and changing enrollment patterns afforded and used the momentum of change to their advantage. The outcome has been a more "user-friendly" learning atmosphere for in-between-agers.

Fundamental research about middle level students and schools began in the 1960's with the advent of the middle level reform movement (Irvin, 1997). The middle school reform movement gained momentum through the 1970's, 1980's, and has moved to the forefront in the 1990's with more published studies and organized professional teacher instruction for this specific level of education. Acknowledgment of the educational needs of the in-between-agers has significantly increased in recent years as proven by the increase in the number of middle school publications, texts, and related teacher training courses available at the college level.

The focus on a developmentally responsive curriculum, organization, and philosophy stems from studies conducted on students and their middle schools. These studies emphasize the importance of addressing the unique needs of adolescents who are undergoing significant physical growth and physiological change at this crucial stage of development. Middle level students are likely to become sexually active, have desperate feelings of isolation, and experience the pressures of negative peer influences (Carnegie Council on

Adolescent Development, 1989). . . Exemplary middle schools strive to provide educational environments conducive to the complex needs of adolescents. As George and Shewey (1994) point out, "When the essential elements of an exemplary middle school are thoroughly and effectively implemented, the outcomes are almost always positive" (p. 115).

Many of the characteristics of an effective middle school are grounded in the research that has been conducted regarding the most developmentally appropriate method of teaching adolescents. As Clark and Clark (1994) state,

As middle level educators became more knowledgeable about young adolescents, their efforts focused more on the development of programs to meet the specific needs of their students regardless of the grade level organization of their schools (p. 15).

The Carnegie Council on Adolescent Development (1989) illustrates the desperate need for consensus between the organization and curriculum of middle grades and the intellectual and emotional needs of young adolescents. Developmentally appropriate education is essential because

. . . middle schools are potentially society's most powerful force to recapture millions of youth adrift, and help every young person thrive during early adolescence (Carnegie Council on Adolescent Development, 1989, p. 8).

#### Purpose of the Study

This body of work attempts to trace and interpret the history of Rosewood Middle School from its beginnings when it

used traditional junior high concepts, to its current exemplary middle school philosophy and programs. This historiography was compiled utilizing document analysis, interviews, and participant observations of administrators, teachers, staff, parents, and community members, concerning the transformation of Rosewood Middle School.

### Guiding Questions

This qualitative study is designed to chronicle the process Rosewood underwent to become an exemplary middle school. Questions that support this investigation focus on the change in educational philosophy and programs at Rosewood. Samples of questions used in the interview are provided in Appendix B.

Discovery questions were asked of the administration, teachers, parents and school board regarding financial and philosophical support as well as their participation in the process of change at Rosewood. How Rosewood changed, including the political, economic, and social origins, was discovered through piecing together the reasons for which participants felt the changes had occurred. These questions were used as topics specifically explored in interviews and documentation (Creswell, 1994).

## Significance of the Study

This study contributes to the middle school literature by documenting the driving forces that promote changing philosophies and programs within a school. Previous research has explored specific problems and practices associated with middle schools, such as team organization, interdisciplinary instruction, and advisory roles of teachers (Irvin & Hough, 1997, p 3). Examples of major studies of middle schools such as George and Shewey (1994) New Evidence for the Middle School and McEwin, Dickinson, and Jenkins (1996) America's Middle Schools: Practice and Progress a 25 year perspective use survey methods to assess program implementation. Additionally, O'Connell (1994) examines the relationship between the essential characteristics of effective middle level education and the level of implementation at schools that had received a national award by comparing multiple school sites. However, historical studies of middle schools that have made the transition to exemplary middle school status have not been conducted previously.

## Definition of Terms

The growth of the middle school has created a vocabulary specific to the middle school. Therefore, the terms and definition are reported in Appendix A.

### Limitations

The findings here are not generalizable to all middle schools and may be subject to other interpretations. However, readers may draw from Rosewood's experiences and find applicable issues that make sense within their own setting. Overcoming the issue of generalization, Lincoln and Guba (1985) maintain that qualitative research, which presents thick description, allows the researcher to transfer the research information to his/her own setting. As with any qualitative study where the main instrument is the researcher, interpretations may vary from report to report.

### Outline of the Work

This study is organized in the following format. Chapter II includes the literature review of the middle school movement. Descriptions of a qualitative study, historiography, methodologies, and the relevance to this study are presented in Chapter III. Chapter IV outlines the background of Rosewood and its evolution to an exemplary middle school. Chapter V contains a summary of the study, conclusions, and recommendations for further study. A glossary of terms is included in Appendix A and Appendix B provides samples of questions for the study. Appendix C provides juvenile crime statistics for the community and Appendix D provides the statistics of school population. Appendix E provides a list



of those interviewed for the study and Appendix F gives the codes used for analysis.

## CHAPTER II

### LITERATURE REVIEW

#### Introduction

There were several different types of literature that were pertinent to this study. Professional journal articles from middle school and secondary schools as well as texts relating to middle school research studies were used. The documents published by the National Middle School Association were instrumental in defining and establishing the changes in the programs and philosophy of middle level education. In addition, the National Middle School Association sponsors publications of research summaries that were useful in finding information related to the findings of other researchers across the country.

Previous research dealt primarily with individual programs related to exemplary middle schools. Middle level reform efforts that improve the educational experiences of students are well documented. Developmentally appropriate research was the focus on research before 1990. The current decade is focused on curriculum reform and program effectiveness. The literature supports the need for

documentation of successful middle schools that have undertaken the responsibility for implementing middle level reforms in their own setting. George and Shewey (1994) suggest that

research conducted in situations in which the effective implementation of required components can be documented will increasingly reflect the desired outcomes of middle school education (p. 115).

The literature review is divided into five sections: introduction, history of middle schools, current research concerning middle schools, implications for educators in exemplary middle schools, and conclusions. The sections are based on the importance of the history of prior research as well as the more recent findings and publications that are currently affecting middle school programs. The section on implications for educators of exemplary middle schools calls for the awareness of needs of middle level students as documented by research, which is critical to the success of educators.

#### History of Middle Schools

Donald Eichhorn, one of the early supporters of the middle school, brought notice to the reform movement in 1966 with his publication of The Middle School (1966) (Irvin, 1997). The ensuing literature, such as The Emergent Middle School (Alexander, et al., 1969), questioned the appropriateness of the curriculum and school organization of the traditional

junior high and made recommendations for programs or introduced concepts to improve the education of middle level students (Alexander, et al., 1969). The structure of these programs was built from a new understanding of adolescents' developmental needs.

This We Believe (National Middle School Association, 1982) was the first official position statement of the National Middle School Association which outlined the characteristics of young adolescents (called transesence at this point, a term which never caught on in the field). It defined middle schools, detailed the beliefs of the National Middle School Association, and stated the essential elements necessary for middle schools to be successful. At this point the term for a school that met the criteria put forth by the NMSA was a "true" middle school. This We Believe (1982) was a resource for schools in developing programs and for researchers in their investigations.

Following This We Believe (1982), several other reports also had a profound effect on the middle level reform movement. An Agenda for Excellence at the Middle Level (1985), published by the National Association Secondary School Principal's Council on Middle Level Education, examined the dimensions of schooling necessary for excellence at the middle level and suggests "solid and practical advice about steps to take at the school site" (NASSP, 1985, p. iii). Caught in the

Middle (California Department of Education, 1987) and Making the Middle Grades Work (Children's Defense Fund, 1988) further influenced the middle school reform movement by providing research which supported developmentally appropriate middle school programs.

Turning Points (Carnegie Council on Adolescent Development, 1989) was the next significant publication to leave its imprint on the history of exemplary middle schools. It called for the mobilization of all sectors of society to build a national consensus to make reform of middle grade schools a reality. The call to change middle schools immediately was directed at educational leaders, health professionals, community organizations, and the states. Additionally, philanthropic sectors, parents, and even the President were charged with the task of working together to transform middle grade schools. The rationale behind the desperate call to action rested on the findings of the Council.

The Council found the primary task of educational and related institutions was to help provide the building blocks of adolescent development for youth and to prepare them for adult life. As Hough and Irvin (1997) state, Turning Points (1989)

created widespread interest and compelled schools throughout the United States to begin implementing bona fide programs, policies, and practices for young adolescent learner (p. 352).

Turning Points (1989) promoted widespread responsibility for making the changes that were going to be necessary to prepare youth for the future.

The literature of middle schools of the last three decades extolled the virtues of successful programs and criticized components that did not contribute to the success of middle school age students. But the history of exemplary middle schools is recent and still unfolding. While characteristics of exemplary middle schools are clearly outlined by the National Middle School Association, implementation of programs is not consistent throughout the United States (McEwin et al., 1996).

#### Current Research Concerning Exemplary Middle Schools

The philosophy of exemplary middle schools argues for developmentally appropriate schools which take into account the total being of the adolescent, including self-esteem and self-concept. This philosophy is best worded by the National Middle School Association's research summary titled Exemplary Middle Schools (1996) as an approach that "centers on the intellectual, social, emotional, moral, and physical development needs of young adolescents" (p. 1). Subscription to the philosophy of exemplary middle schools includes implementation of supportive programs, such as

interdisciplinary teaming and advisory as well as exploratory programs (National Middle School Association, 1996).

The most important recent document about middle schools is the position paper, This We Believe: Developmentally Responsive Middle Level Schools (National Middle School Association, 1995). Written in 1982, revised in 1992, and "re-visioned" in 1995, its purpose was to clarify and give direction to the middle school reform movement (National Middle School Association, 1995). It called attention to the philosophy and practice of middle level education, stating,

the importance of achieving developmentally responsive middle level schools cannot be overemphasized. The nature of the educational programs young adolescents experience during this formative period of life will, in large measure, determine the future for all of us (p. 33).

Turning Points (Carnegie Council on Adolescent Development, 1989) is still a crucial text in current middle school literature, although it is ten years old. Turning Points (Carnegie Council on Adolescent Development, 1989) has not been replaced by an equivalent study and is still employed to justify present practices. It is in direct alignment with the philosophies and practices established by the National Middle School Association. Additionally, it adds recommendations to transform the education of young adolescents and build a future for them.

Turning Points (Carnegie Council on Adolescent Development, 1989) called for middle grade schools that create

small learning communities, teach a core academic program, and ensure overall success for all students. The goal of effective middle level programs is to improve academic performance by fostering good health and fitness, re-engaging families in the adolescent's education, and connecting schools with non-academic communities. Furthermore, it is essential to staff middle grade schools with educators who are experts in teaching adolescents. The Council noted that staff empowerment (teachers and administrators) to make autonomous decisions affecting the students' experiences is essential to success. Turning Points (Carnegie Council on Adolescent Development, 1989) provided qualitative and quantitative measures that signaled potential problems with young adolescents and suggested initiatives to improve the educational experiences of all middle grade students.

New Evidence for the Middle School (George & Shewey, 1994) contributes an overview of early research activities in middle level education and furnishes results from the 1985 and 1993 studies of middle schools that the authors deemed exemplary. This text reports survey evidence collected from administrators and staff members. They found schools that implemented the philosophies and programs of the exemplary middle school were achieving measurable success in academic achievement and other student variables such as attendance, tardiness, and discipline.



The 1985 and 1993 surveys in New Evidence for the Middle School (George & Shewey, 1994) demonstrated relationships between program implementation and student success. The 1985 survey disclosed that those middle schools identified as exemplary implemented a substantial number of appropriate programs for the education of young adolescents, reported positive outcomes, and foreshadowed the emergence of the middle school concept. The 1993 survey identified those components that contributed significantly to the effectiveness of middle school education. The most effective components, identified by administrators and staff members, were interdisciplinary team organization, team leaders, flexible scheduling, student recognition programs, shared decision-making, heterogeneous grouping, and a student-centered school philosophy. Less effective components included foreign language programs, organizational arrangements encouraging long-term teacher-student relationships, advisor-advisee programs (another name for advisory), school buildings designed for middle school concepts, and effective relationships with receiving high schools.

Boxed in and Bored: How Middle Schools Continue to Fail Young Adolescents-And What Good Middle Schools Do Right (Scales, 1996) built on research conducted since 1993 and focused on how improvements could be made to the existing programs. This study concluded that even though many middle

grade programs have improved, the implementation of programs must continue to evolve. Otherwise they will stagnate. It suggested that programs can be improved by adding more ungraded minicourses, creating more challenging curricula, and providing opportunities for more supportive adult relationships within the school.

The Internet site of the National Middle School Association (NMSA) is a valuable resource for acquiring the latest NMSA research summaries. The research summaries provide the NMSA's position on critical issues in the middle school reform movement. The intent of the summaries is to answer the most commonly asked questions about the middle levels of education. Research summaries are available on issues such as grade configuration, flexible scheduling, statistics on numbers of middle schools, exemplary middle schools, young adolescents' developmental needs, heterogeneous grouping, and middle level licensure. Additionally, summaries are available on grade five in the middle school, advisory programs, sports in middle grades, evaluating the effectiveness of programs, and academic achievement. The site is updated regularly and new research summaries are added often.

Current research about specific issues of middle level education is abundant and easily accessible. A variety of articles on exemplary middle schools have been published

covering such subjects as interdisciplinary teaming, professional preparation of middle level educators, the changing structure, and service learning (See Appendix A for definition of these programs). These articles support the endeavors of middle level programs and middle school philosophy.

### Implications for Educators in Exemplary Middle Schools

The focus of recommendations in the literature to middle level educators starts with impressing the need to understand the age level of the students they serve.

Above all else, prospective middle grade teachers need to understand adolescent development through courses and direct experience in middle grade schools (Carnegie Council on Adolescent Development, 1989, p. 59).

Many research studies recommend implementation of programs found to be successful for adolescents and which enhance the exemplary middle schools. George and Shewey (1994) recommended continuing programs that show success, such as interdisciplinary teaming and discarding the programs that do not appear to be effective, such as foreign language programs.

Other research focused on characteristics of the exemplary middle schools with regard to the individual adolescent including self-concept and self-esteem. Lipka (1997) described an ideal middle school as one in which

positive self-esteem and building self-concept revolved around a self-enhancing program that engaged students with their environment and encouraged students to exercise more control over their lives in schools. He believed that by addressing the conditions outside the school that enter into the formation and alteration of self-perceptions, a well-formed middle school emerges. Other authors, such as Stevenson (1992) and George and Alexander (1993), detailed the importance of self-esteem and self-concept at the middle school age level in their texts.

Still, motivation is a key aspect of middle level students which educators must address. Unfortunately, adolescent motivation has been documented to decline for many adolescents as they move into middle school (Anderman & Midgley, 1997). Anderman and Midgley (1997) asserted that the decline is often attributed to physiological and psychological changes associated with puberty and, therefore, inevitable. However, these authors contend that "when students make a transition into a facilitative school environment, motivation and performance can be maintained or even improved" (p. 41). Schools have successfully incorporated elements of similar research findings into the development of middle school programs such as advisory, teaming, cooperative learning, intramural sports, and service learning.

The middle school literature emphasizes educators' awareness of the developmental needs of ten to fourteen year old students. Teaching Ten to Fourteen year Olds (Stevenson, 1992) provided critical information about knowing students in this age group and providing responsive teaching. Educators of all age groups, but particularly the middle ages, need to realize the importance of understanding the needs of students, as well as the self-esteem, self-concept, and motivation of middle school students. Manning (April, 1994) recommended middle level teacher education programs which

firmly prepare prospective middle-level educators in young adolescents' physical, psychosocial, and cognitive development and emphasize the importance of developmentally appropriate middle-level school practices (p. 47).

### Conclusions

The literature available on middle level programs and practices is growing at such a fast rate that it is "impossible for any chapter, book, or series of books to claim to provide a complete synthesis of [middle school] research" (Strahan, 1992). The literature reviewed for this study provided background for the study. Major text publications and articles expressly concerned with issues involved in the study were reviewed and information utilized.

Effort was made to review oppositional and supportive literature about exemplary middle school philosophies and

concepts. However, it was found there is an abundance of literature that supports exemplary middle school philosophies and concepts, while little literature cited opposition. The only article which criticized the middle school reform movement was Cuban (1992) who stipulated that a "vast majority of [middle] schools . . . resemble the junior highs they were supposed to reform" (p. 246). However, Cuban (1992) continued to say that many middle schools do "exist that fulfill the dreams of reformers of the National Association on Middle Schools" (p. 246). It is noted that, Gatewood (1998) voiced dissatisfaction with the integrated curriculum approach, as it is currently used thematic base in middle school.

An interesting discovery in the literature is that middle school philosophies and concepts are beneficial to other age groups as well. It was found that some middle level concepts are moving to higher grade levels.

Middle level education has made tremendous strides. The school that was at the bottom, often referred to as education's stepchild, has moved to the top. Now, it is seen as the model for the way education ought to proceed at other levels (Manning, 1997, p. 4).

Middle school literature continues to expand. Many researchers have discovered that middle school has been a forgotten area of schooling. Presently, the trend is to study middle level education and middle schools. Middle school studies have concentrated their efforts on specific programs or comparative surveys. The call for continued research in middle level

education focuses on being "more innovative in investigating the 'intangibles' of middle schooling" (Strahan, 1992). One of the suggestions Strahan (1992) made is to study "how do good schools get better?" The suggestions for studies on exemplary middle schools appear to be based on programs and why they are successful.

## CHAPTER III

### METHODOLOGY

#### Assumptions and Rationale for a Qualitative Design

Qualitative research is context-specific; ideas, people, and events cannot be understood if isolated from their socio-economic context or if isolated from the past or present (Edson, 1990). The qualitative researcher then uses an interpretive frame of reference to bring meaning to experience. Therefore, these characteristics of a qualitative research inquiry fit this study. This study created a context-specific look at the transitions that took place at Rosewood and used an interpretive frame to bring meaning to those transitions.

Creswell (1994) explained that the process for a qualitative study

includes advancing the assumptions of qualitative designs, indicating the specific type of design, reflecting on the researcher's role, discussing data collection, developing data recording procedures, specifying verification steps, and delineating the narrative outcomes of the study (p. 144-145).

These procedures were followed in this study.



Creswell (1994) identified qualitative study as

an inquiry process of understanding a social or human problem based on building a complex, holistic picture, formed with words, reporting detailed views of informants, and conducted in a natural setting (p. 1-2).

Tracing the history of Rosewood required the stories of the individuals who associated themselves with the school; therefore, this qualitative study is about people, a school, and a community. It was conducted in a natural setting, and my goal was to develop a complex portrait of the transformation of a middle school that utilized junior high concepts into an exemplary middle school.

#### Type of Design Used: Historiography

This study used the qualitative method referred to as historiography. The goal of a historiographer is to uncover the history of a person, place, or event (Barzun & Graff, 1985). However, as Lightfoot (1983) pointed out, what the researcher reports is merely one view or portrait of the subject in question. The researcher's selection of factual information and/or interpretation of the interviews conducted may conflict with what another researcher would report. Historiographers try to maintain the integrity of the information, but they understand that the portrayal of the final product is a reflection of both the topic studied and the researcher (Edson, 1990).

Historiographers cannot be exclusively inductive researchers, drawing from the specific and then generalizing; they also use a deductive approach, moving from general events to specific relationships. Historiographers, such as Grant (1988), in, The World We Created at Hamilton High, use both inductive and deductive measures. Grant (1988) traced the history of Hamilton High, documented the history of its teachers, students, and administrators and reported the national educational perspective. He used the specific school history and related it to national issues and trends concerning schools, such as racial desegregation, deconstruction of traditional authority structures of schools, and the mainstreaming movement (p. 77). Similarly, the history of Rosewood will be discussed in relation to the specific history of its teachers, students, administrators and socio-economic context, and then related generally to the history of the middle school movement.

Historical approaches to the research of people, events, and ideas cannot be understood apart from their historical context (Edson, 1990). The history of Rosewood is related to the local and national historical background and must be presented as such. Historical inquiry seeks to interpret and explain the significance of past experiences, not just document them (Edson, 1990). As Edson (1990) stated, knowing

that no historian can ever discover or communicate the whole truth about a person, an event, or a

place in the past, historians seek to reconstruct as closely as possible the past as earlier participants experienced and understood it (p. 48).

The first task in establishing any historical study is the choice of a subject (Travers, 1978, p. 378). The idea is that to be studied, the event or person should represent something of some significance (Edson, 1990). Fortunately, as facts are assembled, a rough parameter is established and the quantity of information (its lack of or abundance) will dictate a broader or narrower boundary (Travers, 1978, p. 379). The study of exemplary middle schools is an excessively broad subject. While prior studies have focused on programs, the history of Rosewood's transitions provides new information concerning how programs and philosophies evolve.

An important aspect of a historical study is that determining cause and effect relationships should not be the aim of historians.

The historian usually deals with chains of related events, but he [sic] cannot say that one event in the chain was caused by the previous event in the chain (Travers, 1978, p. 384).

In this case study, events are documented, but the analysis of such events does not include a cause-effect linkage.

Historiographies of schools that have experienced changes, such as Rosewood Middle School, offer valuable information for other schools experiencing change. There is a "need, in education, for historical study of important ideas that have influenced the school and public policies related to

them" (Travers, 1978, p. 379). The historical approach to this study fills a void in previous research regarding the middle school movement. Information about how programs and philosophies evolve in a school is important for educators and researchers to know in order to assist in promoting change in various settings.

### Role of the Researcher

As researchers we bring multiple stances to our studies- in degrees of conscious and subconscious awareness- as we choreograph, depict, and resculpt stories and meaning from what we are examining (Ely, Vinz, Downing, & Anzul, 1997, p. 38).

The role of the researcher in a qualitative study is one of a stranger. A person who does not know the outcome, a stranger to the field gathers the data. Yet, the report is one mixed with personal bias, history, and perceptions; the unknown has become known and is integrated into who the researcher has become. Therefore, qualitative research, "emphasizes subjectivities as an integral part of the research process" (Ely et al., 1997, p. 53). My own subjectivities include a strong interest in the middle school philosophy and my current professional life as an assistant principal in a middle school.

## Data Collection Procedures

In a qualitative study, Creswell (1994) suggested that four parameters should be considered: setting, actors, events, and processes. The setting in this study was Rosewood Middle School. The actors were the administrators, teachers, staff, parents, and school board members. The events within the school included programs and social events and their impact on the exemplary middle school transformation. The interview and observation process continued until the researcher determined the amount of information collected was sufficient to complete the study.

Two forms of data collection were primarily utilized: interview and document analysis. Creswell (1994) recommended that in a qualitative study the documents and participants should be purposefully selected. Rubin and Rubin (1995) suggested that "you need to interview those who have particular knowledge or can discuss specific experiences that you want to know about" (p. 66). The interviews were conducted with administrators, teachers, and parents currently and previously associated with Rosewood. The documents that were used in the study included local newspapers, school board minutes, and school schedules. Effort was made to secure primary source documents, and all interviews were conducted with primary participants. In addition, participant

observations of the school site were used in a limited capacity.

Interviews can be a major part of the historical collection of information. Those that yield the most information are those that are well planned and executed yet allow for an unstructured flow of information. Some researchers, such as Measor (1985), stipulate that structured interviews are to be avoided in qualitative research because they inhibit the historical discovery process (p. 67). However, he also emphasized that the researcher must be aware which direction the interview should take. Rubin and Rubin (1995) used the terms semistructured or focused to describe an interview style where the interviewer introduces the topic, then guides the discussion through specific questions (p.5). In some cases, interviewers should ask questions to find specific information but should also allow for "rambling" (Measor, 1985). This study used a semistructured format but also gave open ended, broad questions at the beginning and end of the interviews (See Appendix B). This was done to allow for inclusion of additional information.

In formal interviews with individuals, a tape recorder is necessary as well as a list of questions. Rubin and Rubin (1995) recommend transcribing interviews as a matter of good record keeping which increases credibility (p. 86). In this study, all interviews were transcribed. Follow-up interviews

were necessary for clarifying facts and for a discussion of themes found in the first interviews. The audiotapes were transcribed and destroyed when the study was complete.

Information collected through the interview process entailed combining different points of view to form one narrative. In order to do this I had to select informed participants and confirm facts and events with others involved in the study as well as documents which provided detailed information such as dates. Rubin and Rubin (1995) support this in that,

interviewers must solicit information that can be checked against other sources, such as personnel files or meeting minutes, and interviewees must be chosen who are knowledgeable about distinct parts of an event or have different perspectives on what occurred.

The interviews were conducted in an unstructured, open-ended format with primary source participants. Interviewees were given the opportunity to respond to questions in writing if they preferred. Written responses allowed for time to be selected and allotted by the interviewee to answer the questions and also the comfort of being able to think about questions and formulate a planned response.

The questions varied in each interview based on the participants' role. Questions pertaining to the guiding questions were asked of all interviewees. Follow-up questions were used as Rubin and Rubin (1995) suggest as

pursue(ing) the implications of answers to the main questions. Follow-ups examine central themes or events, or ask for elaboration about core ideas and concepts (p. 146).

#### Data Recording Procedures

I met with the entire staff, approximately 115 members, of Rosewood the last day of the 1997-1998 school year. At that time staff members were asked if they would be interested in being interviewed for my study and, if so, to please fill out the information sheet (telephone numbers and convenient time and month to call) which was supplied. Fifty-five staff members returned the requested information, which allowed me to call them over the summer.

I took the data from the information sheets and telephoned the staff who had indicated they would not oppose an interview. I tried to contact each person at least twice. I left messages on answering machines and with spouses. I arranged times to interview some individuals in person and others by telephone. After two attempts to contact interviewees, I discontinued attempts. When contacted, some indicated that they had changed their minds.

I scheduled interviews with all the teachers and staff members that returned my calls. I tried to schedule as many interviews as possible in person; however, if individuals indicated that they really did not have that much time, I offered the convenience of a telephone interview. Many



thought that the telephone was the most convenient way to be interviewed, and they agreed to be interviewed immediately or scheduled a better day to call them.

There were many people interviewed from various positions within the school. For example, the three school principals were interviewed as well as the three superintendents who served during the time of Rosewood. A fourth superintendent, who was an interim, is deceased. An assistant principal who worked for each of the principals was also interviewed. The current school board president was interviewed. Seventeen teachers, one counselor, two staff members, three parents, and two former students were interviewed. The total number of interviews was thirty-five.

Sixteen interviews were conducted in person. Eighteen interviews were conducted by telephone. One interview was conducted using e-mail. On average, interviews lasted about thirty minutes. The longest interview was with the current principal. It lasted almost three hours. The shortest interview was with a former student. It lasted about ten minutes.

#### Additional Information Collected

##### During the Study

Participant observations were utilized in this study in a limited capacity. The site visits provided information

about the school. The visit on the last day of school was valuable as the entire staff, custodians, teachers, cafeteria workers, administration, and secretarial staff, were all in attendance. The visits to the school during the first weeks of summer to conduct interviews assisted in acquiring information without imposing on administration or staff time with students and teachers. The two day visits, one in the fall and one in the spring semester, provided more in depth views of what the school looked like during operating hours.

The programs identified by the National Middle School Association as characteristic of exemplary middle schools were observed in action to ascertain implementation levels during the site visits. These included interdisciplinary teaming and exploratory programs. Visiting Rosewood while classes were in session revealed that interdisciplinary teaming was used. A variety of electives were offered on nine-week, semester, and year-long rotations to allow for students to experience several different electives during the year.

The school board minutes were reviewed from 1972 through spring, 1998. The minutes provided very basic information such as contractor approvals, approval of monetary expenditures, hires and fires. I took notes on anything that pertained to Rosewood Middle School or employees that I had interviewed.

The community newspaper and the neighboring metropolitan newspaper were reviewed for articles pertaining to the school. Numerous articles were found related to sports and incidental news of the school. There were some articles that traced the evolution of the school and those were related to the growth and re-districting of the district. Some newspaper articles provided information about community concerns. The articles, written from a third-party perspective, provided objective commentary concerning school projects as well as parental concerns about the increase in violence.

Other documents used in this study included newsletters, class schedules, school yearbooks, and district/school policy handbooks. In the academic year 1997-1998 the middle schools in the district developed a report requested by the superintendent to educate the school board as to the rationale for middle school. I obtained a copy of that report. Copies of daily bulletins and discipline report forms were also obtained. The older documents I was able to obtain came from interviewees who had kept copies for themselves. It should be noted that current daily bulletins are kept no more than a few days. However, the bulk of the data for the study came from interviewees. Eventually there were more than 300 pages of tape transcriptions.

## How the Research Was Analyzed:

### Narrative Outcomes

I read through the transcripts and then took notes. Ely, Anzul, Friedman, Garner, and Steinmentz (1994) recommend analysis from the very beginning of the data collection because it assists in rephrasing interview questions (p. 140). Questions were altered in subsequent interviews to guarantee clarity. After the transcripts were transcribed, they were numbered consecutively. I read through them in one sitting as Bogdan and Biklen (1992) suggest. I also read through the documents I had collected.

I read the transcripts a second time taking notes of approximately 65 potential code titles. These notes were based on what Bogdan and Biklen (1992) describe as the first step of developing a coding system. They suggest searching through data for

regularities and patterns as well as for topics your data cover [sic], and then you write down words and phrases to represent these topics and patterns (p. 166).

The code titles were developed as the information was sorted by category. As Ely, et. al, (1994) suggested, I created codes based on categories that I had established by marginal comments and analytic memos (p. 145).

The list of 65 codes was collapsed into a list of 25 codes (see Appendix F). Some of the original codes were

varying terms for the same category such as number of students, growth of student population, and size of the school. During the third complete reading, I coded the transcripts. I read the transcripts after they were coded. To illustrate, I read the information about teaming, noting page numbers and summarizing responses. This was repeated with each of the 25 codes. This information is included in Chapter IV.

After coding the information and summarizing the transcripts, I discovered themes. Ely, et. al, (1994) defined a theme as

a statement of meaning that (1) runs throughout all or most of the pertinent data, or (2) one in the minority that carries heavy emotional or factual impact (p. 150).

The general themes that were found included: desegregation, growth, and leadership as well as evolution through the middle school concept.

Rosewood was established as a means to alleviate significant student population growth, which was caused, in part, by desegregation in the neighboring metropolitan area. The general intent of this study was to trace the changes that took place in the transition from a school with traditional junior high concepts to a school that had the programs and organizational structures of an exemplary middle school.

The transcripts and documents supported the themes that Rosewood was created from federal mandate to desegregate

schools at the national level. The growth of Edwards, like other suburban communities throughout the United States, influenced the establishment of the middle school within the community. However, it was administrative leadership that created the middle school in Edwards. These themes as described in Chapter IV created the framework for the history of Rosewood Middle school.

#### Methods of Verification

Lincoln and Guba (1985) used terms such as "trustworthiness" and "authenticity" in establishing verification of qualitative research. Ely, et. al, (1994) stated that a qualitative researcher must pay continuous attention to being trustworthy (p. 156). One way for historiographies to become more trustworthy is by increasing the number of different sources used in the study. Therefore, since this study primarily drew from interviews, the number of interviews conducted was important for verification of information. The observation visits that were made to the school verified interview information and the documents that were obtained assisted in supporting the interview information as well.

Lincoln and Guba (1985) as well as Ely et. al. (1994) also suggested the use of member checks to increase the authenticity of interviews. Member checks allow the

participants to review the interpretations with the researcher to confirm they are adequate representations of the participants' realities (Lincoln & Guba, 1985). Member checks were conducted by restating information and time lines the interviewees gave as well as use of follow-up questions about the interpretation of quotes that were used in the writing. The three principals, one teacher, and the superintendent's secretary were contacted a second and/or third time for verification of dates, times, people's names, and clarification regarding the interpretation of events.

The best validation available for interviews is triangulation of interviews (Measor, 1985). Interviewing several individuals who hold different viewpoints allows for increased trustworthiness of information through triangulation (Lincoln & Guba, 1985). Teachers, administrators, and parents usually demonstrate different perspectives of the same issue or event. Issues such as interdisciplinary teaming and exploratory programs were explored through the perspectives of each of these groups. However, triangulation of interviews does not result in a unified interpretation, but rather a more complex, in depth understanding of the event (Mathison, 1988).

Triangulation of documents is also used in this study in a manner similar to the triangulation of interviews. Suggested by Lincoln and Guba (1985), triangulation takes into account multiple perspectives through multiple interviews as

well as documents. This method of verification is important in qualitative studies as reliability and validity methods of verification for quantitative studies are not compatible with this type of research. Denzin (1989) also suggested using triangulation of data, investigators, and theories to provide as many perspectives as possible. Mathison (1988) detailed one difficulty with the concept of triangulation by indicating that even when researchers triangulate, the findings will not provide precise data but a "rich and complex picture of some social phenomenon being studied" (p.15).

Even though the researcher made every attempt to be objective, objectivity is rarely accomplished, and many believe it can never be accomplished. However, stating the researcher's subjectivity does not eliminate it from the study (Heshusius, 1994). The information that is found will be "subjected to the action of the researcher's mind" (Barzun & Graff, 1985, p. 165). "No piece of evidence can be used for historiography in the state in which it is found" (Barzun & Graff, 1985, p. 165). The researcher must question information gathered during research as to its authenticity, trustworthiness, and implications (Barzun & Graff, 1985, p. 165). The information reported is information that I perceive as the most important information. Therefore, some subjectivity is revealed simply by what information is omitted. Additionally, in the evaluation of written documents, authenticity and the



subjectivity of the writer are considered. Questions about the authentic nature of the document are asked.

Participant observations in conjunction with interviews allowed the researcher to determine if the programs implemented within Rosewood were authentic programs and if they adhered to the characteristics outlined by the National Middle School Association. The documents pertinent to class schedules, school maps, and teacher assignments also provided evidence of some programs, but an on-site visit to the programs in progress allowed for confirmation of their implementation.

The foci of the participant observations were to observe the use of teaming, varied instruction, diverse electives, and interdisciplinary units within Rosewood. Visiting classrooms during class times and observing teachers and students as well as projects and displays allowed for confirmation of interview information. These observations are detailed in the findings.

#### Relevancy of Methodology to this Study

The historical study lends itself to the discovery of the process of becoming an exemplary middle school. Tracing Rosewood from its inception to its current status provides valuable information on how change occurs in a school. Research had already successfully identified the programs and components of exemplary middle schools. Researching the

history of Rosewood as it changed provides a template of how implementation of new programs and philosophies can be accomplished successfully or unsuccessfully.

Interviews of participants involved in the transition from junior high philosophy to exemplary middle school philosophy provide important information in understanding this transition. Surveys cannot tell the emotional trials and financial barriers that had to be overcome to establish the middle school program. Interviews about how change is implemented also demonstrate the character, experience, and emotions of the people who are involved in the process of change. Interviews additionally identify the responsible parties and the tasks that had to be undertaken for the programs to be successful.

The documents that are used in this study provided basic factual information and details that participants were found to have forgotten. Several interviewees could not remember specific dates or, sometimes, even years. However, documents such as board minutes and yearbooks provided factual information, such as the years in which events occurred. The interviews could not have provided all the needed information.

#### Summary

The design for this study was historical. Interviews provided the primary source of data; documents were also used.

Observations were also conducted to observe components of a middle school in action. This study used triangulation and member checks to verify information.

## CHAPTER IV

### FINDINGS

#### Introduction

In the fall of 1976 the city of Edwards opened a new middle school, the first middle school in the city's history. Edwards was like most suburbs - a commuter haven. Edwards provided community activities, churches, grocery stores, and fast food establishments to support its commuter population that left each morning to work in MetroCity. In 1976, industry in Edwards was minimal and home building was on the rise (Edwards Economic Development Authority<sup>4</sup>, EEDA, 1998).

Growth in Edwards in the middle seventies was spurred by the perceived impact of forced busing in nearby MetroCity. The 1954 *Brown vs. the Board of Education* Supreme Court decision was intended to desegregate schools. However, it was the National Guard escorting students to school in the 1960s and court orders to desegregate schools through cross-town busing in the 1970s that pushed many parents with school-age

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<sup>4</sup>Edwards Economic Development Authority is a pseudonym for the economic development authority of the community, which Rosewood resides. This information is maintained as confidential according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB# Ed-98-117).

children into the suburbs. According to administrators and teachers, Edwards was a recipient of the white flight movement of the 1960s, 1970s, and 1980s.

The new middle school, Rosewood, was constructed to meet the demands for additional school space. In 1965 Edwards had a school membership of 3,230 (See Appendix E). Six years later, Edwards' school population was 5,193 - an increase of almost 2,000 students. Predictions of continued growth prompted school officials to create a plan to reconfigure the grade arrangements. In 1973, with a growth of over 850 students in the previous two years, the school board decided that a middle school would be built and ready for the 1976-1977 academic year. This middle school would meet a need for the predicted growth of Edwards schools, as well as the influx of kindergartners who would be required by new compulsory attendance laws to attend school in 1976.

Other suburban towns also experienced significant growth caused by the exodus from MetroCity. However, Dr. Alton<sup>5</sup>, the former superintendent (1973-1987), attributed Edwards' larger growth to the beauty of the community. Edwards was more heavily wooded than other surrounding areas. Dr. Alton also

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<sup>5</sup>Dr. Alton is a pseudonym for the superintendent of Edwards Public School District. This superintendent was in office from 1973-1987. The tapes of interviews and transcriptions are in the possession of the author according to the IRB. Oklahoma State University, Stillwater, Oklahoma. (IRB# ED-98-117). Hereafter interview will appear as Alton IRB/OSU.

felt that the location of a state university encouraged more commuters to locate in Edwards.

Middle schools were relatively new to the state. In 1968 Alexander et al., (1968) reported fourteen states not having middle schools, including the state in which Edwards is located. McEwin, Dickinson, and Jenkins (1996) reported in their study America's Middle School: Practices and Progress: A 25 Year Perspective, that of the 1,798 middle schools that responded, 59% were established after 1980 and 29% were established between 1988 and 1992. Therefore, in relation to the middle school movement, Edwards' establishment in 1976 was at the beginning of the middle school movement.

The administrative plan for Rosewood was that with the inclusion of kindergarten, the need for space at the elementary level was critical. Therefore, Edwards' school board decided to take on a newer plan for a middle school. The plan would take the sixth grade from the elementary schools and place it with seventh graders. The eighth graders, formerly at the mid-high, would be housed at a separate site. Before 1976 the configuration of schools was K-6 grades (elementary), 7<sup>th</sup> grade (seventh grade center), 8-9 grades (mid-high) and 10-12 grades at the high school. After 1976, the new configuration would be the following: K-5, 6-7, 8<sup>th</sup>, 9-10, and 11-12. The advantage of this configuration was

that it provided a more even distribution of student population.

The tenures of Rosewood's three principals relate to the general time periods that will be discussed in this study. Therefore, this chapter is divided into sections, each of which is designated by the decade the various principals acted in leadership positions. Bobby Jacobs<sup>6</sup> was the first principal at Rosewood (1976 to 1980). Dr. Barbara Sanders<sup>7</sup> was the second principal of Rosewood during the eighties (1980 to 1989). And, Evan Jones<sup>8</sup> the present principal of Rosewood assumed this position in 1989 (1989-1999). Each will be discussed in the following sections.

## The 1970s

### Middle School Movement of the 1970s

The middle school movement has a short history. Middle schools, in name or organization, did not appear in literature until 1961. In fact, the first article that appeared under

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<sup>6</sup>Jacobs is a pseudonym for the first principal of Rosewood. The tapes of interviews and transcriptions are in the possession of the author according to the IRB Oklahoma State University, Stillwater, Oklahoma. (IRB # ED-98-117). Hereafter interview will appear as Jacobs IRB/OSU.

<sup>7</sup>Dr. Barbara Sanders is a pseudonym for the second principal of Rosewood. She wrote answers to the interview questions. All e-mail and hard copies are in the possession of the author as required by the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter cited as Sanders IRB/OSU.

<sup>8</sup>Evan Jones is a pseudonym for the third principal of Rosewood. Interview tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter be cited as Jones, IRB/OSU.

the name "middle schools" was in the Education Index in 1961 (Cuban, 1992). Traditional establishment for the school system between 1920 and 1960 included the 1-6 grade elementary, the 7<sup>th</sup> -9<sup>th</sup> junior high, with 10<sup>th</sup> -12<sup>th</sup> grade high school.

There are several reasons for the creation of the middle school cited by authors. Authors such as Alexander et al. (1969) cite dissatisfaction with the junior high philosophy, while others such as George and Alexander (1993) cite population growth and/or desegregation as the purpose of the creation of middle schools. The NASSP Committee on Junior High School Education (1967) identified that the key for reorganizing grades into middle level units was the

administrative organization needs to be determined on educational grounds, rather than for such reasons as building expediency, economy, or racial imbalance (p. 69).

Authors of middle school topics in the 1960s clearly identified that multiple reasonings were behind the new grade level configuration termed middle school.

The 1960s and 1970s were times for the reevaluation of the school configuration. Schools which were desegregated, because of court decisions, found that one way to integrate was to create more grade divisions. This would group larger numbers of same grade students together. One model that was commonly incorporated was to take sixth grade students out of the elementary school, combine them with seventh and eighth



grades, and place ninth graders at the high school. This allowed sixth graders to be bused out of their neighborhood schools into middle schools which were consequently more diverse racially (George & Alexander, 1993). It should be noted that busing was already in place for high school students. Beane (1993) describes

overcrowding and desegregation on the one hand and research about early adolescence and dissatisfaction with the junior high school on the other, we can begin to see the emergence of what would become the middle school movement (p. 8).

The 1960s and 1970s were turbulent times for public schools and the general population of the United States as well. While the Vietnam War was being waged, the country was trying to integrate the military, schools, and society. Throughout the turmoil many held on tightly to tradition. The country needed a common ground. Americans had historically used the school as a vehicle to educate children to live successfully in American society. But, society was changing in the 1960s and 1970s, and schools were trying to change also. In some communities, the schools were the vehicle the federal judiciary used to create change. Federal court decisions prompted many school boards to develop plans to integrate schools. Even though middle school educators of the 1960s called for a program that provided for individual differences, program continuity, and curricular innovations (Alexander, et al., 1969), most communities created middle

schools as a solution to solve the difficulties of desegregation and student growth (George & Alexander, 1993).

Grade configuration identified a middle school in the 1960s and early 1970s. For example, Alexander defined the middle school as having between three and five grades, of which 6<sup>th</sup> and 7<sup>th</sup> should be included (McEwin, et al., 1996). Literature of the 1960s and early 1970s, such as National Association of Secondary School Principals (1967) and Kealy (1971), used surveys of grade configuration to indicate how many schools were middle schools. Not until the early 1970s did authors elaborate on additional middle school issues such as curriculum, non-academic activities, maturation of students, and guidance (Lounsbury & Vars, 1971). Alexander, et al., (1969) describes the case for a new middle school from the standpoint of human growth and development, from the inadequacies of the 6-3-3 plan, and what it would take to improve on these areas of education. Articles after this text appear to support the ideas and programs suggested by Alexander, et al. (1969).

Studies indicate a consistent growth of middle schools between the 1960s and 1980s. The number of middle schools (defined by the grades 6 and 7 having none below 4<sup>th</sup> grade and none above 8<sup>th</sup> grade) that were in existence according to studies found by George and Alexander (1993) showed significant gains. The 1965-66 survey indicated there were

499 middle schools in the United States. The 1967-68 survey found 1101 middle schools. The 1969-1970 study reported 2298 middle schools; the 1974 study counted 3723 middle schools, and the 1978 survey numbered 4060 middle schools. (George & Alexander, 1993)

The National Middle School Association (NMSA) was established in 1973 to serve as a voice for professionals, parents, and others interested in the educational and developmental needs of young adolescents (About NMSA, 1998). The NMSA 1977 Committee on Future Goals and Directions established more clearly defined expectations of what middle schools should incorporate in their mission statements. These goals included the idea that every student should be well known by at least one adult. Students should achieve optimum mastery of skills and continued learning as well as acquire a functional body of fundamental knowledge. Students should also have opportunities to explore and develop interests in aesthetic, leisure, career, and other aspects of life. (George & Alexander, 1993)

The middle school movement during this period achieved a restructuring in grade level organization and fostered a grassroots movement for improving the middle level grades. Restructuring the grade organization was the beginning of the middle school movement. Once grade organization was completed, middle schools sought to obtain their own identity.

Proponents of the middle schools such as George, Alexander, and Lounsbury, knew that in order to be more successful than their junior high predecessors, they must know their students better and provide an educational environment and curriculum more suited to their students' developmental needs.

#### Edwards 1970s

The 1970s was a time of change for Americans generally and those who lived in MetroCity and Edwards specifically. People who had been moving to the cities for work in the 1950s and 1960s were now retreating to the suburbs to raise their families. Additionally, desegregation of inner city schools through forced busing created a need for housing in the suburbs as well as schools to support those families. In Edwards, during the 1970s, approximately 6,000 homes, or 33% of the homes habitable in 1998, were built (EEDA, IRB/OSU). According to administrators, teachers, and Edwards Economic Development Authority reports, young families moving into these homes were white, middle and upper class (EEDA, IRB/OSU).

Rosewood Middle School was created by a need to adapt to the increasing population of the school district. The superintendent (1973-1987), Dr. Alton, stated,

I think it (the growth) was fueled by the negative concept of busing which was probably a good idea, but it did not have the support of the community (Alton, IRB/OSU).

Several school employees, including superintendents, used the term "white flight" to describe the reasoning behind the growth of Edwards Public School. Therefore, the rationale to create a middle school was one of numbers and not philosophy, which was similar to other middle schools across the country. Dr. Alton indicated he had little experience with middle schools. Dr. Alton stated

I like the philosophy of not making kids choose limited electives; I liked them to have the broader choices . . . I also liked the team concept and thought that was sound education. It worked very well for them . . . However, I had other hats to wear, and so I could not go to a lot of meetings. But, I was sold on it. You had to sell the board, and you had to sell the community, which was not an easy task. After a year or so it was really embraced by the community and by the students and faculty . . . The main reason we created the middle school was probably a physical thing (Alton, IRB/OSU).

The middle school was completed in 1976 with money generated from a bond issue passed in 1973. The intention of the school board was to convert Rosewood into a high school in the future. With this intent in mind, the architectural plans were drawn with limited middle school influence. Middle school philosophy was seen in the architecture through the team concept design as well as the sunken sitting areas where teams of students could meet. Rosewood was also constructed with "wings." That is, each hallway was one grade. Another middle school architectural design incorporated in Rosewood

was the placement of the administrative offices in the school center, which facilitated coordination between grades.

Bobby Jacobs was selected as Rosewood's first principal. Jacobs graduated from Edwards High School and attended college in state. Jacobs moved to Nebraska after college to teach for four years at a middle school. He came back to the state to start a doctoral program. When he started the program, he was offered a job in Edwards at the central office as a state facilitator. It was through this position that Jacobs became aware of an administrative opening at the middle school. Jacobs felt that because middle school experience was not common among the other applicants, he was selected for the job. Jacobs accepted a challenging position, a new school, a new grade configuration, new philosophy, and a merged staff of teachers from across the district.

The building was complete; however, the school board was not aware of what a middle school really looked like in operation. Jacobs talked about the interview with the superintendent. He stated

It was the first middle school, and they had not really defined what that was themselves, and so during the interview, they asked the candidates to tell them, what is it? What do you think it looks like? What would we do different, what do we need to start and what do we need to stop? What do we need to continue doing a different way? And so, the interview itself was very unique . . . It was rather lengthy and a lot of specific questions relating to middle school, middle school aged students, policies, procedures, grading, organizing, and curriculum. They really wanted to

talk about how will this school be different because it was a brand new building, a brand new opportunity (Jacobs, IRB/OSU).

Jacobs was excited to be part of something new and innovative. Opening day was a festive occasion.

When we opened the school the first day, we had about 1,200 students there . . . We had them all out in front of the school to play patriotic songs and if you can envision 1,200 people holding hands around a flagpole while a little kid plays a coronet. I have a picture of it. It's really amazing. We really dedicated the school. We kicked it off. We knew it was going to be special, and we had a terrific dedication. I was very proud (Jacobs, IRB/OSU).

A young and enthusiastic administrator who instinctively knew what was best for kids was the description Dr. Alton gave Jacobs. Many of Jacobs' programs, plans, and philosophies were based on what he believed was best for kids. Some of the programs implemented at Rosewood, such as team teaching for sixth graders, followed middle school research suggestions. Jacobs indicated that he had a strong interest in middle school and wanted to provide a place uniquely designed for the middle-level age group. He specifically wanted to look at the needs of the students. However, some of his ideas came from texts on effective businesses.

In the academic year 1976-1977, the first year Rosewood was opened, it contained sixth and seventh grade. The eighth graders were housed in the previous student services building located approximately five miles away. Jacobs was the principal of both sites, and the staff at Rosewood was a

merged group of teachers. The sixth grade teachers consisted of sixth grade teachers from schools throughout the district (sixth grade being previously elementary). Jacobs discovered later that some of the sixth grade teachers that came that year were actually teachers of other elementary grades who had "traded up" with the former sixth grade teachers to come to middle school. The teachers who traded wanted to come to middle school, and/or the sixth grade teachers who did not want to come to middle school had seniority and chose to stay at their elementary site. At this time the sixth grade teachers were elementary certified.

The seventh grade teachers at Rosewood had transferred from the seventh grade center. These teachers had been working together, but not in an authentic middle school teaming situation according to seventh grade teacher, Mark Grouse,<sup>9</sup> who would become an assistant principal at Rosewood its second year. Most of the seventh grade teachers were secondary certified as well as the eighth grade teachers, who were located at the student services center. The eighth grade teachers maintained traditional secondary procedures such as departmentalization. The eighth grade was not considered a

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<sup>9</sup>Mark Grouse is a pseudonym for the assistant principal of Rosewood from 1977-1982 who became the principal at Fredrick in 1983. Interview tapes and transcriptions are maintained by the author according to the IRB, Oklahoma State University (IRB # ED-98-117). Hereafter cited as Grouse, IRB/OSU.



part of Rosewood Middle School at this point but rather the eighth grade center.

The climate of Rosewood was reported by teachers to be accommodating and positive. Linda Frances<sup>10</sup> described Rosewood as

a real comfortable situation and setting. You felt like you could try things without being inhibited or intimidated or things like that. Everybody was looked at as being equal which I think is real important (Frances, IRB/OSU).

Even in the early years of Rosewood teachers felt that Rosewood represented a "serious child centered environment." Susan Dawson<sup>11</sup> recalled the Media Center filled with Christmas presents for needy families (Edwards Perspectives, 1996).

Jacobs spent a lot of time developing a positive school culture and working environment at Rosewood. He felt his main job was to draw together the conglomeration of professionals into a viable, successful staff. Jacobs laughed about the times they got together to play in the gym on evenings and weekends. He said a lot of times the male teachers would all get together to play volleyball, basketball, and floor hockey. He stated it was very common for the entire male staff to be

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<sup>10</sup>Linda Frances is a pseudonym for a seventh grade math teacher at Rosewood. Mrs. Frances has been at the school since 1977. The tapes of interviews and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater Oklahoma. (IRB # ED-98-117). Hereafter interviews will be cited as Frances IRB/OSU.

<sup>11</sup>Susan Dawson is a pseudonym for an eighth grade American History teacher at Rosewood who had been at Rosewood since 1977. The tapes of interviews and transcripts are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, OK. (IRB #ED-98-117) Hereafter interview will appear as Dawson IRB/OSU.

at the school on a Saturday playing something. Jacobs recounted a story about hiring a new teacher:

Two days before school started, a geography teacher resigned his position. I thought Oh! What are we going to do? School starts tomorrow. We don't have good candidates and Mark said, "Remember that guy that was goalie for gym hockey two weeks ago? He was on your team." I said, yeah, that real tall guy? He said, "Well he's at the World Series right now watching baseball. He is a friend of mine. He's looking for a job." So, I called him over the phone and hired him. You play gym hockey with a guy; you get to know him pretty well. He turned out to be one of the finest geography teachers I've ever seen. He was this big, tall guy who loved sports and loved kids (Jacobs, IRB/OSU).

Jacobs suggested that the reason Rosewood was so successful was the quality of teachers and staff. Jacobs stated,

We recruited the finest teachers. Edwards at that time was a very desirable place to work. We could take our pick of the really top quality people, and we never worried about filling a position (Jacobs IRB/OSU).

Jacobs described the teaching staff at Rosewood as one of the best. He stated, "I don't care where you go on this planet, you'll never find better teachers anywhere. They are just unbelievably good" (Jacobs IRB/OSU).

The sports programs at Rosewood took some criticism from the parents in the early years. During the 1970s research in the area of competitive sports programs at the middle school level suggested that intramural sports programs were more appropriate than competitive sports for this age group. Jacobs was aware of this research and acted to implement

intramural programs. Dr. Alton indicated that the only hard buyout in the implementation of middle school concepts was convincing the community that athletics were not the most important part of education. After four or five years of reduced numbers of competitive sports at the middle school and increased intramural sports, the community observed that it did not affect state championships in high school.

Intramural sports programs and limited competitive sports continued throughout the tenure of Bobby Jacobs. Jacobs indicated that audience attendance increased at school intramural competitions. Jacobs believed that the school board was critical in establishing the athletic standards for the middle school based on the supporting policies that it passed. The district athletic director had several objections to reduction in competitive sports programs, but his objections were ruled invalid by the school board.

Teachers such as Linda Frances commented on the sports program that was implemented in the first years of Rosewood.

Linda stated:

I think that the middle school concept of sports is real good because it's giving everybody a fair chance to play . . . I just think that's real important because a student at this age may find out that they really do like a sport that they have thought about and even pursue that into high school. In fact, just this last week, two young men who were seniors were both drafted by pro-teams for baseball, and they were two of our former students. Perhaps if they had not started early

and had been given an opportunity they may have not found out that they really liked it (Frances, IRB/OSU).

Cheerleading was eliminated at Rosewood based on suggestions from the staff. Jacobs stated,

The cheerleaders were spending I think it was \$800 or some horrible amount, maybe \$400, but they had both away and home jerseys and we were grooming some nice little Vegas showgirls (Jacobs, IRB/OSU).

The suggestions included having a spirit club where anyone who bought a T-shirt could get in the game free and any five kids who made up a cheer that was approved could perform at the game. Thus, cheerleading in its traditional form was not an option for Rosewood students. Mark Grouse, a teacher during the first year, stated, "As soon as (cheerleading) was not a real selective thing that only eight people could do, it died" (Grouse, IRB/OSU).

Jacobs stated he was very interested in developmentally appropriate education which focused on the social, emotional, and physical needs of the students as well as academic needs. One of the ways he promoted this interest was to place emphasis on guidance and counseling. Jacobs provided additional opportunities and encouraged counselors to provide guidance in the classroom. He also provided activities for the students, such as opening the gym in the evenings and holding parties. Jacobs emphasized,

We did not have dances. We did not push the traditional junior high, let's be like the high school thing, but we did play music . . . and had all kinds of food and games (Jacobs, IRB/OSU).

Teacher and staff perceptions of what students and discipline were like in the 1970s was in contrast to what teachers reported about students and discipline in the 1990s. The 1970s students at Rosewood were described as respectful and courteous. Teachers did not indicate specifics concerning behavior except to note that corporal punishment was still a part of the procedures. Linda Frances indicated that she was not an advocate of corporal punishment. However, discipline was more clearly defined than in following years (Frances, IRB/OSU). The students attended school and were expected to follow the instructions of the teachers. Mrs. Alex<sup>12</sup>, the cafeteria manager, remembered the 1970s as a time in which children were less mature than they are in the last years of the 1990s. She also remembered the 1970s as a time when teachers were in control and children respected their elders (Alex, IRB/OSU).

Several ideas, such as traditional schedule configurations, as well as more recently expanded ideas of developmentally appropriate education, were merged with the creation of Rosewood. Elementary schedules had provided only physical education and music and therefore had to be expanded to include the availability of multiple electives. Traditional secondary notions of sports programs in which only

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<sup>12</sup>Mrs. Alex is a pseudonym for the cafeteria manager who has been at Rosewood since 1976. Interview tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, OK. (IRB # ED-98-117) Hereafter cited as Alex, IRB/OSU

the best students played were revised to create opportunities in which all interested students could play. Jacobs indicated that more traditional teaching was likely at Rosewood during the late seventies. Jacobs stated,

In some ways we were probably very traditional. I'm sure some of our classroom organization, some of the teachers, I'm sure as far as delivery of instruction I'm sure you would see straight rows and lecture (Jacobs, IRB/OSU).

But, changes did take place at Rosewood. One change Mr. Jacobs concentrated on was a coordination of curriculum. Jacobs reported that on the sixth grade teams, each science teacher taught his/her own curriculum; one teacher taught small engine repair, one paleontology, and another electricity. The science teachers did not communicate with each other when it concerned curriculum. Mr. Jacobs placed the teachers in a room for the purpose of providing a forum. He told the science teachers, "Hey y'all tell me what you are going to do . . . What are we going to teach? How many days?" (Jacobs, IRB/OSU). Communication between teachers and administration was critical in the area of curriculum as well as other areas of the new middle school.

Total subscription to middle school philosophy--providing intellectual, social, emotional, moral, and physical developmental needs-- was not the initial intent of Rosewood. Jacobs stated, "It was probably more executive business [philosophy]" (Jacobs, IRB/OSU). Jacobs expanded the idea of

a business philosophy by talking about the problems associated with managing so many people, and he felt the key was communication. Jacobs was very interested in creating a strong communication background within the school. Jacobs stated,

We tried to take a look at how the staff would communicate with each other and how we would communicate with students and how we would communicate with parents (Jacobs, IRB/OSU).

There were also several concepts that were introduced, such as intramural sports instead of competitive sports, elimination of cheerleading, and an emphasis on counseling. The sixth grades teamed, sharing the same students who traveled together from class to class, mirroring the program at the elementary level.

The key characteristic checklist of an exemplary middle school (developmentally appropriate, advisory, interdisciplinary teaming, varied instruction, transition programs, and exploratory curriculum) identified that Rosewood was not an exemplary middle school in 1980. Rosewood did not have the advisory program (See Appendix A) in place. Interdisciplinary units were not utilized, varied instruction was not emphasized by the administration, and departments still existed. Therefore, Rosewood was an infant in the middle school field. Although a few of the characteristics, such as developmentally appropriate philosophies could be identified, the rest were not apparent. There were attempts

to be developmentally appropriate. One example was inclusion of all students who wished to play sports. Another example is illustrated by a story that Mr. Jacobs related about a boy who attended Rosewood, which demonstrates the child-centered atmosphere of the 1970s:

Our free-throw contest, I'll never forget . . . we invited the students to come up on Saturday anytime they wanted to and anytime they were ready they could shoot . . . I think 15 shots for a free-throw contest, and, of course, any kid can stand and get in line and shoot . . . We had this T-shirt that said champ with a little gold medal on it . . . [John] was so proud [to have won]. He slept in that shirt, wore it all year long and of course, my vice-principal called him champ and "hey champ" and of course, I did too. It was really amazing and a very touching thing. Four years later the boy shows up and he comes in. Of course, he's taller. I almost didn't recognize him. He moved when he was in the 6<sup>th</sup> grade. I said, "Hey," immediately went to "How you doing champ?" kind of thing. He asked for his teachers . . . and went down to see them and asked for the vice-principal. He was very close to Mr. Grouse, and Mark was gone that day. After 20 or 30 minutes, the teacher he had in the 6<sup>th</sup> grade came back and said, "Oh Bobby, you won't believe this but John has run away from home . . ." He had gotten into a fight at school. The vice-principal wanted to paddle him, and he wouldn't take the licks and ran away from home. His mother had died, and his father was an alcoholic. It was a horrible story but this kid had run away from [another state] someplace and the only place he could think of to run was this great place that he remembered in 6<sup>th</sup> grade. I thought, what a story. It was to him [a place] where he was loved, where he was successful. People made him feel good (Jacobs IRB/OSU).

Jacobs resigned in June 1980 to finish his doctoral degree. After graduating, he worked as a senior consultant for the state school board association, wrote books and acted



as a consultant for superintendents and school districts. Presently, Jacobs is a superintendent in another state. However, he has very fond memories of Rosewood. Jacobs said:

Of all the jobs that I have had, including the one I have now, which I truly love, probably being the principal at Rosewood will be the highlight for me . . . Sometimes Mark and I would eat Mexican food on Friday. My vice-principal and I would then go back to work at 10 o'clock or we may go back up on Saturday. We did not know we were working. It was truly a pleasure. It was just a pleasure, never minded going to work. You throw yourself into it and that was such a great place. It was so easy to dedicate yourself to that particular place and time with all the great people (Jacobs, IRB/OSU).

#### Analysis of Rosewood in the 1970s

The themes that developed in this study during the 1970s focused on the creation of Rosewood as a result of white flight during the decade. The themes further included Rosewood's participation in the middle school reform movement, and administrative leadership at Rosewood. These themes established how Rosewood related to the national reforms, and how its climate and programs were founded.

The growth of Edwards was the primary reason for the establishment of Rosewood. It propelled the district into creating more school space to serve the numbers of students coming into its schools. Dr. Alton believed that building a middle school would most benefit Edwards' growth difficulties. Therefore, he researched the physical plant information available and visited some middle schools in the mid-west.

Rosewood was a product of Edwards' need to have more space, as well as of Dr. Alton's knowledge of middle schools.

Although Edwards' population was increasing, it was not apparent who the people were. Even though the late 1970s and early 1980s were impacted by recession, growth was still taking place. This meant families who could afford to escape MetroCity did so. This placed a disproportionate amount of wealth in Edwards.

Further, Edwards population was primarily white. These factors essentially created a re-segregation of schools. The MetroCity schools were "desegregated," however, suburb schools, such as Edwards, provided the segregated environment that many whites wanted. Evan Jones, a teacher at Rosewood from 1978 to 1981, who would later become the principal, described Edwards' population in the 1970s:

1976 was the first time a black student graduated from Edwards Public Schools.... It was less than one percent minority and that included Native Americans and the Orientals that might be here because their families were here, and they had a parent going to the university (Jones IRB/OSU).

The establishment of Rosewood as a middle school during this period indicated that Edwards was participating in the national middle school movement. The issues surrounding the decision to create a middle school in Edwards were also typical of the time. Many school districts answered the call to desegregate by creating middle schools. George (1988) indicates that

all over the South at first then throughout the Northeast and the urban areas of the Midwest and then the West Coast, district after district announced the arrival of the middle school concept, coincidentally side by side with school desegregation (p. 14).

The issue of desegregation essentially created Edwards because of the numbers of whites fleeing MetroCity to avoid having their children bused across town.

Rosewood was not on the leading edge of middle school reform but joined the movement while holding onto many of the more traditional roles of a junior high school. Rosewood was a middle school only in so far as a form of teaming was used in sixth grade and a more developmentally appropriate learning environment was created. However, there were many characteristics of a middle school which were not established at Rosewood, such as varied teaching, interdisciplinary units, teaming as detailed by the National Middle School Association, and an advisory program.

Rosewood's administrative leadership during those first years under Jacobs was inconsistent because he was an inexperienced principal. He was very young and was given the extraordinary responsibility of opening Rosewood. However, as Susan Dawson said,

[Bobby Jacobs] is one of those guys that presents a really competent look, real enthusiastic guy. He is really a nice guy, but I really get the feeling looking back that he was in over his head from the get-go (Dawson IRB/OSU).

Jacobs also felt that he was young and inexperienced those first years. Jacobs stated,

You look back and you think, I wish I had been a little older, a little smarter, a little more talented . . . [The superintendent] did not get in the way. He allowed me my first year to learn and do dumb things (Jacobs IRB/OSU).

Jacobs laid the groundwork upon which Rosewood would grow as middle school. His vision of a developmentally appropriate middle school drove his hiring practices. His interest in business philosophy led to improvement in communication practices and created an environment in which teachers felt comfortable sharing their thoughts and feelings with colleagues and administrators. Edwards was primed for new, innovative middle school programs and concepts that were to come.

## The 1980s

### The Middle School Movement of the 1980s

During the 1980s program development provided another dimension of the middle school movement. Research had established a grade configuration as the basis for developing middle schools. Professional articles and texts during the late 1970s established some measures of long term goals such as those provided by the National Middle School Association (NMSA). However, it was during the 1980s that programs and philosophies were developed for the middle schools. Many of

these were successful. Therefore, program development was the focus of middle schools during the 1980s.

Proven organizational patterns and programs defined exemplary middle schools in the 1980s. The National Middle School Association published This We Believe (NMSA, 1982) which detailed what middle schools should be doing to be effective. This We Believe (NMSA, 1982) states:

A "true" middle school will evidence the following conditions or characteristics, called essential elements: Educators knowledgeable about and committed to young adolescents, A balanced curriculum based on the needs of young adolescents, A range of organizational arrangements, Varied instructional strategies, A full exploratory program, Comprehensive advising and counseling, Continuous progress for students, Evaluation procedures compatible with the nature of young adolescents, Cooperative planning, and Positive school climate (p. 27).

However, it was not until the 1980s that clearly delineated organizational patterns and programs were required to accomplish middle school goals.

The middle school movement during the 1980s, while focusing on program and philosophical development, was still overcoming the restructuring of the grade level organization in some communities throughout the country. Some schools developed middle school organization in the 1960s, while others reorganize in the 1970s and 1980s. According to McEwin, Dickinson, & Jenkins (1996), 59% of the schools they studied were established after 1980. The decade in which

middle schools were established demonstrates varying implementation levels of programs and philosophies.

This We Believe (NMSA, 1982) provided the first "consensus as to what constituted the clear philosophical and programmatic bases for middle level education (NMSA, 1992, p. 1)." It established the rationale for the middle school, identified characteristics of young adolescents, defined a middle school, summarized what "true middle school" characteristics were, and provided resolutions recommended by the National Middle School Association. Educators throughout the country utilized the information provided by the NMSA to shape and develop the middle school programs that were in place and to develop new middle schools.

In the 1980s additional pressure to develop middle schools was created by the Nation At Risk(1983) report (George & Alexander, 1993). "Virtually every state in the nation implemented laws intended to infuse high school programs with new rigor (George & Alexander, 1993)." This created a need for ninth grade to be counted for graduation requirements. This, in turn, created a new rationale for ninth grade to be housed in the high school.

Many sources during this period provided reports about the success of middle schools and the continuing need to improve middle school programs. The National Middle School Association published the Middle School Journal, which

detailed programs, philosophies, and practices. Caught in the Middle: Educational Reform for Young Adolescents in California Public Schools (California Department of Education, 1987) provided an in-depth look at programs and philosophies needed to create effective schooling at the middle grade levels. Also, Turning Points: Preparing American Youth for the 21<sup>st</sup> Century (Carnegie Council on Adolescent Development, 1989) provided a detailed text on what should be done to develop middle grade schools, regardless of grade level organization, that would recapture American youth and help them thrive during early adolescence.

The 1980s were a period of evaluating the past and setting future goals. Educators now had resources to assist in program evaluation, as well as additional research information. Therefore, middle schools were developing an identity of their own. They continued to prosper and gain momentum. George & Shewey (1994) reported in their 1985 survey that in middle schools which had implemented a majority of the desirable programs for the education of young adolescents it was found that substantially positive outcomes had occurred. Some of the outcomes they identified included consistent academic improvement and improved school discipline in almost every measurable manner. They also found improvements in students' self-concept, social development, and attitudes toward school. Additionally, they found

increased positive feelings about teachers and an increase in parental involvement.

For the middle school movement, the 1980s was a period of growth and reflection at the national level. The publications during this time period focused on providing information about middle school issues to the nation. Schools across the country were at various stages of becoming middle schools. Some middle schools were well established and maintained the essential characteristics recommended by the National Middle School Association, while other schools had just begun reforms by establishing a grade configuration.

#### Edwards 1980s

Significant growth occurred in Edwards during the 1980s. The middle school incorporated more programs as outlined by the National Middle School Association. Meanwhile, inflation rose. The community experienced repercussions of the oil bust, which significantly impacted the state and local economy (The Daily MetroCity<sup>13</sup>, 11-24-88). However, student population continued to grow at a constant rate (See Appendix E). In 1981, the Reagan Administration dealt with "stagnant economic growth, high inflation, and soaring interest rates. The

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<sup>13</sup>The Daily MetroCity is a pseudonym for the metropolitan newspaper. Identification of this newspaper would enable the reader to identify the location of the school site, which is maintained as confidential as per the IRB, Oklahoma State University, Stillwater, Oklahoma. (IRB # ED-98-117).



nation endured a deep recession throughout 1982" (Presidency of Ronald Reagan, 1996). Financial difficulties were the norm. However, Edwards prospered.

Dr. Barbara Sanders was hired to become the principal at Rosewood in July 1980. She had been hired by Dr. Alton based on his observations of her work as a counselor and then as an elementary administrator within the system. The decision to hire Sanders was based on her strength as a leader, her organizational skills, and her work ethic. Dr. Alton knew a strong organizational leader was needed to deal with the forthcoming growth issues. He was also interested in hiring someone to continue to promote middle school programs and philosophy.

Dr. Sanders was a definite change for Rosewood in leadership style and personality. Twenty-year teacher Leroy Carr<sup>14</sup> described Dr. Sanders as

a more structured individual. A lot more regimental type planner, more deliberate in her approach to education, where Bobby Jacobs was more laid back (Carr IRB/OSU).

These characteristics assisted her in implementing several middle school concepts at Rosewood.

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<sup>14</sup>Leroy Carr is a pseudonym for a seventh grade science teacher at Rosewood. He has been at Rosewood for twenty years. The tapes of interviews and transcripts are in the possession of the author according to the IRB Oklahoma State University, Stillwater, Oklahoma. (IRB # ED-98-117). Hereafter interview will appear as Carr IRB/OSU.

Descriptions of Dr. Sanders remained consistent throughout the interviews. Susan Dawson, an original and current teacher at Rosewood, described Barbara:

[She was] definitely a workaholic. Barbara gave everything to [the] school and we used to laugh that when she woke up at night it was to think of new things for us to change to. She was very decisive. She was very goal-oriented, and she knew what she wanted to do. She knew where she wanted to take us. She also was very student-oriented but she challenged her teachers constantly to improve (Dawson, IRB/OSU).

Teacher Linda Frances described Dr. Sanders as "a great example of what an administrator should be . . . She always wanted you to stretch a little bit" (Frances IRB/OSU).

Another teacher, Martha Duke<sup>15</sup>, said:

At first she intimidated me tremendously. I mean, this lady was like a freight train on high gear. I tried to stay out of her way. Eventually, I became very good friends with her, and I found out that she was one of the most professional, well-read individuals that I have ever known in my life (Duke IRB/OSU).

As Dr. Alton stated, Mr. Jacobs did a great job of laying the foundation by hiring good people and establishing a positive climate. However, Dr. Sanders was considered by all who were interviewed as the driving force behind what became and is known today as Rosewood.

Dr. Sanders' husband, Frank, was the Director of Middle Schools in MetroCity Public School System. With his position,

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<sup>15</sup>Martha Duke is a pseudonym for an English and history teacher at Rosewood. Since 1984. Interviews tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter cited as Duke, IRB/OSU.

both Mr. Sanders and Dr. Sanders had the opportunity to become personal friends with middle school leaders such as Al Arth, John Lounsbury and J. Howard Johnston. These men were closely associated with the national middle school movement. This allowed Dr. Sanders to become knowledgeable about middle school philosophy, curriculum, and scheduling. She took the opportunity to incorporate exemplary middle school characteristics at Rosewood, although at that point the term was "true" middle school.

The parents were generally supportive of Rosewood during the 1980s; however, they still questioned the limited competitive sports program. According to The Daily MetroCity, parents petitioned the school board in March of 1982 to expand seventh grade athletics. At this point the schedule included four varsity football games and six varsity basketball games. However, school officials maintained that seventh graders were not physically and emotionally mature enough to decide what extracurricular activities to engage in. Therefore, they were not ready for high school level competitive sports. In keeping with middle school philosophy, Dr. Sanders stressed that in seventh grade the emphasis was on intramural athletics through the physical education classes. The issue of competitive sports in the middle school remains an issue in the 1990's.

During Dr. Sanders' first year at Rosewood, Fredrick Middle School<sup>16</sup>, Edwards' second middle school, was in the process of being built to house sixth grade students. Before Dr. Sanders arrived at Rosewood, the assistant principal, Mark Grouse, was selected to become the principal at Fredrick. Many of the teachers and staff transferred with him to Fredrick. Therefore, this immediately forced her to hire new teachers and staff at Rosewood.

Dr. Sanders described her first year as one of "building relationships, getting to know the teachers and their individual strengths, talents, and personalities" (Sanders, IRB/OSU). She found out after accepting the position at Rosewood that she would also be responsible for the eighth grade center. At that time Rosewood housed 1100, sixth and seventh grade students. The sixth grade used interdisciplinary teaming, but the seventh grade was still departmentalized. Dr. Sanders believed that Rosewood was not really a middle school in anything but the name. She stated,

Even though the sixth grade teachers team-taught, they did not really understand much about the team concept such as team leaders, team meetings, and communication about curriculum, instruction and student needs (Sanders, IRB/OSU).

Dr. Sanders wrote about the first year in her e-mail responses to the interview questions. She described the

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<sup>16</sup>Fredrick is a pseudonym for the second middle school built in the Edwards (pseudonym) school district. Names of places have been changed according to the IRB, Oklahoma State University, Stillwater, Oklahoma. (IRB # ED-98-117).

policies that she implemented, such as creating and developing guidelines and procedures for team meetings, identifying team member and leader responsibilities and roles, and requiring weekly team meetings. The team meetings included an administrator, a counselor, and all the core teacher team members. Dr. Sanders credited her three counselors with being able to train teachers in developing skills, such as conducting conferences with parents, reporting to parents, and working with marginal students. Another skill in which the counselors trained teachers was to identify and address student needs before problems escalated and required more serious intervention.

During Dr. Sanders' second year, 1981-1982, part of the 8<sup>th</sup> grade center students were relocated between Rosewood and Fredrick. Only four teachers came from the eighth grade center to Rosewood. The teachers knew that if they came to Rosewood, they would be expected to maintain middle school philosophy, which Dr. Sanders was introducing to the staff. Many chose to go to the high school. During the second year at Rosewood, the sixth grade teamed, but seventh and eighth grades were still departmentalized. Dr. Sanders stated that during her second year, the first with all three grades, her goal was "to develop a better understanding and some skills necessary for people to become effective team members" (Sanders, IRB/OSU). She started by enhancing the effectiveness

of the sixth grade teams through staff development and modeling team meetings.

In addition, new classrooms were being added onto the school to accommodate the growing numbers of students. The construction caused a shortage of classrooms, which in turn caused teachers to have to "float" (travel to classrooms that were empty each hour). This could have presented a difficulty in maintaining a middle school concept, under which teams are located together. However, they did not let that issue become an obstacle.

Also during Dr. Sanders' second year, she implemented transition programs and exploratory electives. The transition programs provided fifth graders with a preview of middle school by having students, teachers, and counselors visit their fifth grade classrooms. In the spring, the fifth grade parents were invited to attend an orientation as well. Similar transition programs were provided to eighth graders and their parents. The exploratory elective programs rotated sixth grade non-band members through as many of the electives as possible on nine-week rotations. The seventh graders rotated through three 12-week rotations, and eighth graders had semester long electives.

Dr. Sanders established a schedule during her second year to facilitate flexible scheduling (See Appendix A). Flexible scheduling allowed for interdisciplinary teams to have the

same planning time. However, sixth grade was the only grade that teamed, and teachers were not able quickly to recognize the benefits of flexible scheduling. Therefore, they failed to utilize it effectively. Flexible scheduling was promoted through staff development exercises once teaming was established at all grade levels.

The sixth grade teachers who teamed shared a common plan time and a common group of students. Departmentalized seventh and eighth grade teachers were harder to communicate with, and a lot of time was used trying to keep teachers informed.

Dr. Sanders wrote:

The seventh and eighth grade teachers did not have the convenience of common planning times for teachers who shared a common group of students. Therefore, everything [was] repeated several times before everyone knew what was going on with students, with parents, and within the school. Counselors could see and appreciated the effectiveness that came from the organizational structure of the sixth grade teams; however, teachers saw things from a different perspective and could not see how inefficient and ineffective things were in seventh and eighth grade because of departmentalization. I knew we had to make a change; however, I also knew I had to have enough people understand the concept in order to assist in making the change throughout the school. My goal was to bring about change but to do it in a way that would not cause people to feel so threatened that they would cause it to be unsuccessful and fail (Sanders, IRB/OSU).

Some teachers supported Dr. Sanders, while others had difficulty. Ovetta Daniels<sup>17</sup>, a supporter, described Dr. Sanders as a "go-getter," someone who knew where she was going, a person with high standards. She stated that Dr. Sanders was supportive, encouraging, energetic, proactive, highly involved with parents, and child centered (Daniels, IRB/OSU).

There were some teachers who did not support the middle school programs and philosophies Dr. Sanders was implementing. Many of the teachers who were not convinced that the middle school philosophy was effective transferred from Rosewood or retired. Ovetta Daniels described the teachers' resistance to changing over to middle school philosophy:

They either worked through it or they moved to another location; at that point in time the other two middle schools...were still departmental (Daniels, IRB/OSU).

Others, like Stacy Kellum<sup>18</sup>, who were originally resistant, eventually understood how the programs (such as rotating electives, advisory, and teams) could be beneficial. She laughed when I asked her about her feelings about teaming. She told me that she had been in a group that had written

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<sup>17</sup>Ovetta Daniels is a pseudonym for an eighth grade math and science teacher who taught at Rosewood (pseudonym) from Fall of 1984 to Spring of 1995. Interviews tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter cited as Daniels, IRB/OSU.

<sup>18</sup>Stacey Kellum is a pseudonym for the I Teach program instructor. Interview tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter cited as Kellum, IRB/OSU.



formal letters of complaint to Dr. Sanders about the introduction of teaming and their reasons why it would not work. Presently, Kellum is a strong advocate for middle school programs and philosophies.

Dr. Sanders felt that Fredrick had an impact on what was happening at Rosewood. Fredrick Middle School teachers were friends with Rosewood teachers, and they talked among themselves about the schools. Dr. Sanders wrote:

I knew we had the personalities and talent to make the needed transition, but I could see it would be something that should move slowly and bring people along. That way the vocal minority would not sabotage our efforts. My second and third years were spent in working to develop sixth grade, as well as spending time with seventh and eighth grade teachers to establish more effective techniques on conferencing and reporting to parents, instructional practices, how to better serve all student academically, and disciplinary strategies (Sanders, IRB/OSU).

Dr. Sanders challenges increased when the district began construction of a new building for Rosewood.

The old site would become a high school . . . [this school still exists in Edwards]. It seemed as if every year there was a new issue that centered around the growth in the district which impacted what we were doing. This had both advantages and disadvantages (Sanders, IRB/OSU).

The new Rosewood was built with features that were designed to accommodate the middle school philosophy (including grade level pods, team meeting areas, and facilities for elective courses). Several rooms were also equipped with folding doors in order to provide double-size classrooms for large group

activities. The teachers and administrators were involved in the architectural planning. However, as with most contracted jobs, it was not finished on time. A construction worker's death when a concrete slab fell on him caused the largest delay. As a consequence, the project was significantly postponed. During this period, the contractor filed for bankruptcy and therefore was replaced with another.

Postponement of construction created significant difficulty in moving to the new Rosewood site in summer of the 1983-1984 academic year. The only areas that were ready for occupancy were the sixteen classrooms in the East wing, the cafeteria, gym, library, and administrative area. The problem was to fit 1200 students into sixteen classrooms. Because the first Rosewood was already being used as a high school, the only choice was to move in and somehow make it work. Dr. Sanders did some creative planning. Dr. Sanders wrote:

Planning would involve teachers, parents, and communication with students. Needless to say, I had a few sleepless nights trying to determine just "how" we might go about making such an unusual challenge a positive experience for all people involved. I knew it was a challenge like no other . . . There was never a doubt in my mind that we would make things work and that our students would not suffer. We wanted to maintain high expectations for learning, emotional security for students, and not let things become fragmented and chaotic (Sanders, IRB/OSU).

The plan called for three classes of sixth graders to meet in every two connected classrooms. Since sixth grade teachers had experience in teaming, it was easier for them to

be able to teach in close quarters. The eighth grade would use the gym, cafeteria, hallways, library, and any other usable space. Dr. Sanders requested that teachers use interdisciplinary teaming to make communication and transitions easier. The seventh and eighth grade teachers agreed to work temporarily as core interdisciplinary teams, but insisted that, when the building was finished, they would return to a departmentalized schedule. It was also necessary that seventh graders, after arriving daily at the new school, would then be bused to another building for classes. However, the time spent on the bus had to be used for instruction.

"Star Time" was the designation for the bus ride. The instruction was based on classroom curriculum or theme focuses. For example, at the beginning of the year instruction focused on interpersonal relationship activities. Daniels described the theme of the year as

"The Indomitable Human Spirit." There wasn't anything we couldn't do. Every situation we could take and make it good, worthwhile, and productive (Daniels, IRB/OSU).

After the initial interpersonal relationship unit, students focused on community awareness. They participated in activities such as plotting the streets as they passed them on the bus, charting the numbers of houses and determining how those numbers were established, and other actual travel type activities. The students also completed a music focus that traced the progression and development of music across the

decades. Many of the activities were continued in the classroom once the students arrived in class.

From her first year, Dr. Sanders had wanted teachers in all grades to implement teaming. However, she also wanted teachers to support the change or she knew it would not work. During this unsettled time the teachers agreed to an interdisciplinary teaming arrangement. Dr. Sanders saw that the opportunity for teachers to experience the effectiveness of teaming was pivotal in creating an effective middle school. She knew that opportunities where teachers would willingly try teaming were rare. Even though this school year was not easy, it was critical in demonstrating how positive and efficient teaming could be. However, she had agreed to compromise with the seventh and eighth grade teachers and return to departmentalization. She knew this meant starting the year twice. Before classes began the first time, two schedules were made. One for travel (teaming) and the other for the completed building (departmentalization). Dr. Sanders felt that it was worth the extra work in order for teachers to experience interdisciplinary teaming.

In December 1983, the building was finished. Dr. Sanders kept her promise, and a new schedule was reinstated. However, the opportunity to contrast interdisciplinary teaming and departmentalization persuaded more teachers to choose teaming. The seventh grade was convinced of the effectiveness of

interdisciplinary teaming. So, the next year, seventh grade voluntarily switched to teaming. Dr. Sanders wrote,

Teachers clearly saw the difference and knew it was a better structure for students and for themselves. They said they never realized how much support it provided for them as professionals (Sanders, IRB/OSU, July 1998).

Eighth grade teachers did not immediately opt for the teaming concept. Ovetta Daniels, a 6<sup>th</sup> grade teacher and supporter of teaming, recalled what she saw as the resistance of the eighth grade teachers to teaming:

When you move to the eighth grade level, you had a predominant faculty that are secondary education who are used to doing things "my way." They are more comfortable having their own classrooms and not having to extend themselves to a team and even share what they are doing. So it got down to just even very simple things as far as "what are your plans for this semester?" . . . so the resistance was just because they were used to doing things by themselves and in a very independent way. The trade off is that you have to sometimes compromise. For a few, that was not seen as a step forward (Daniels, IRB/OSU).

By the 1987-1988 school year (Dr. Sanders' 7<sup>th</sup> year), sixth and seventh grades were functioning as interdisciplinary teams. The eighth grade teachers were still resistant to interdisciplinary teaming. Even though they could see the effectiveness of the sixth grade teams, they still remained unconvinced. Finally, the eighth grade teachers agreed to try a combination of teaming and departmentalization. After this intermediate phase, the eighth grade agreed to standard size teams for the 1988-1989 school year.

Generally, teachers' views of teaming were positive. Teachers indicated that they liked teaming because it was easier to keep track of students and to meet with parents. Teachers stated that they liked the camaraderie of working with other teachers and being able to have students in common. Parents liked the idea of all the teachers meeting together for parent conferences and appreciated the ease of communication. Many parents and teachers believed that teaming helped students' transition from elementary to secondary school. Wilma Greg<sup>19</sup>, a parent of three children, stated,

I think the consistency was pretty much the same routine. I think they (the kids) liked it . . . I can't say enough things about the school itself. It was really a positive influence on all three of my kids (Greg, W. IRB/OSU).

Middle school staff development was a priority for Dr. Sanders. Staff meetings focused on major middle school publications and teachers were sent to the National Middle School Association conferences. Teachers who had difficulty accepting middle school concepts had opportunities to transfer to a growing high school or other middle schools, which may not have teamed their teachers. Transfers to other schools were not viewed negatively. Many teachers were transferring to other schools due in part to growth and new construction as well.

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<sup>19</sup>Wilma Greg is a pseudonym for a parent of Rosewood students. Interview tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter cited as Greg, IRB/OSU.

Not only was the organization of schools changing in the 1980s, the student population was changing as well. Teachers reported that students demonstrated less respect for teachers than in previous years. Daniels reported that in the early 1980s "[students] were still eager to learn" (Daniels IRB/OSU). Lynne Bryons<sup>20</sup>, former assistant principal, described some of the behavioral issues she dealt with at Rosewood. She stated that before the 1980s, in her experiences with high school honors students, she had

never had purple Mohawks, and I never before had a student who mooned the school from across the street. My trusty navy blue suit was covered with dust as I learned to search for contraband articles (Edwards Perspectives, 1996).

Violence among teens increased during the 1980s and Rosewood was not an exception. In 1988, a student was hung upside down from a stairwell and again from monkey bars on the playground. The student's mother reported these incidents as racially motivated attacks, as her son was biracial. She also filed assault charges. Shortly after these incidents, another student was beaten in a hallway after school. The Daily MetroCity reported that these incidents were attributed to the school's overcrowded state and inability to monitor all the students.

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<sup>20</sup>Lynne Bryons is a pseudonym for a current assistant superintendent in Edwards and former assistant principal at Rosewood. Interview tapes and transcriptions are in the possession of the author according to the IRB Oklahoma State University, Stillwater, Oklahoma (IRB #.ED-98-117). Hereafter cited as Bryons, IRB/OSU.

During this decade Rosewood experienced an increased number of students representative of lower socio-economic status and minority populations. The interviewees of this study attribute this change to the construction of federal housing within Rosewood's attendance area. Daniels described a situation from 1984, before the enrollment of the students from the subsidized housing development:

I was taking the kids on a field trip walking to a park and everyone was walking in single file. We actually walked through another neighborhood to get to the park and this little girl looked up and said, "Did you see that house?" I said, "Yes, I saw the house." And she said, "Did you see the back yard?" I said, "Yes, I saw the back yard." She said, "It didn't have a pool." I said, "Yes." She said, "I didn't know they built houses without pools..." It was a very high economic period . . . As time went on, that changed substantially (Daniels, IRB/OSU).

The combination of high income students and federally subsidized housing changed the social organization of Rosewood.

Clearly Rosewood had come a long way during Dr. Sanders' tenure. She had implemented interdisciplinary teaming at all levels, flexible scheduling was used periodically, exploratory curriculum had been developed, transition programs were in use, and varied instruction was highly encouraged. Each year showed new growth in Rosewood's becoming a middle school. Dr. Sanders encouraged age-appropriate teaching and expectations. Additionally, staff development programs included instruction on the social and intellectual growth of ten-to fourteen-year



olds. However, an advisory program, a major component of exemplary middle schools, was still missing.

Advisory, a time established for teachers to meet with a small group of students to discuss student concerns, was the last program that Dr. Sanders attempted to develop. During her last year at Rosewood, 1988-1989, she prepared her teachers and staff to incorporate advisory/homebase for the following year. In 1989, another middle school, Rockwood<sup>21</sup>, opened in Edwards. The superintendent determined with the advice of Dr. Sanders that with the opening of the third middle school, advisory would be implemented at all three schools.

During the summer of 1989 Dr. Sanders resigned her position of principal at Rosewood. She was offered a teaching position at a local university. She gave her reasons for leaving Rosewood in 1989.

At that point and time, my husband had been retired for a few years, and I wanted more time in my schedule to spend with him. I had a lot more to do at the school, but felt like the opportunity to take the position at the university would not necessarily come again . . . However, my heart was in middle school (Sanders, IRB/OSU).

After several years at the university, Dr. Sanders retired.

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<sup>21</sup>Rockwood is a pseudonym for the third middle school built in Edwards. Pseudonyms are necessary to maintain confidentiality according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB #ED-98-117)

## Analysis of Rosewood in the 1980s

Rosewood's growth issues, still experiencing MetroCity's desegregation, did not prompt a change in organization, as it had in the 1970s. But, growth increased the difficulty in establishing effective middle school programs. In relation to the national middle school movement, Rosewood was implementing many of the programs highlighted by the research literature of the time. Rosewood's leadership developed middle school programs.

Edwards' population growth did not slow during the 1980s, despite the oil bust and economic recession. Wealthy families were moving to Edwards throughout the 1980s (EEDA, IRB/OSU). The economic status that did alter Rosewood's population was attributed to federal subsidized housing which was built nearby.

Desegregation of MetroCity was not as much of a growth issue in the 1980s as it had been previously. Edwards' city planner, Matt Post<sup>22</sup>, attributes the increased growth of the 1980s to the quality of the schools and housing construction. However, racism and socioeconomic differences did affect Rosewood students. The incidents of reported racially motivated attacks of a biracial student may indicate racial

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<sup>22</sup>Matt Post is a pseudonym for the City Planner of Edwards Interview tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter cited as Post, IRB/OSU.

tensions. However, Dr. Sanders' previous experience with the student suggested that he was a bully. She also stated the boy had asked the other boys to tie him upside down from the rails. Therefore, she felt differently than the parent and newspaper concerning the seriousness of the allegations of racially motivated attacks. Edwards, a product of white flight, failed to confront issues in the 1980s that inner city schools had dealt with several years before. These issues (i.e. cultural and socioeconomic status differences) were new to Rosewood in the 1980s. One adjustment was for teachers to modify classroom activities that incurred cost to students or request the school to assist in funding projects for students who could not pay.

Racial issues were not discussed as a problem in Edwards by many of the interviewees. All teachers and administrators who volunteered to be interviewed were white. In fact, there were no visibly discernable minority teachers during my visits to the school. The only suggestion of an underlying racial problem was the article about the biracial student being hung upside down and interviewees mentioning the changes that occurred with federal housing.

Rosewood's level of middle school implementation advanced during the 1980s. Interdisciplinary teaming was eventually incorporated across the grade levels. Varied teaching styles with flexible scheduling were in place, according to teachers

and administrators. Transition programs were in place. Also, an advisory program was scheduled for the year following Dr. Sanders' resignation.

In relation to the middle school reform movement, Rosewood was considered advanced in the arena of middle school concepts in 1989. Research was still being conducted across the country and Dr. Sanders was an avid follower of current research. She implemented as many middle school programs as she felt she could successfully complete, gaining the support of a majority of the teachers. For Rosewood, the final step for being considered a true middle school would come with the implementation of the advisory program.

Throughout the interviews many teachers described Dr. Sanders as driven, hard working, and stoic. Yet, Martha Duke described a side of her that few ever saw:

We went to this national convention together. It was the first time I had seen her in pink fuzzy bedroom slippers, without makeup. This lady laid it on thick. She always had thick makeup on, like the pancake stuff. It never moved, like concrete. We thought she slept that way. She didn't. She had this little woppy thing on her head. It was almost out of a cartoon . . . She was talking about dating when she was nineteen . . . It made her a true human being. Before this time, she managed to keep a lot of that away from us. But, for those of us who shared that trip with her, it was absolutely wonderful . . . It was really neat to see that she had such a human side. So, as far as a leader is concerned, I don't think Rosewood would have been nearly as successful as it is. I don't think it would have the reputation that it does had it not been for her (Duke, IRB/OSU).

## The 1990s

### Middle School Movement of the 1990s

The middle school movement in the 1990s introduced the importance of curriculum. While the 1970s focused on grade organization, and the 1980s on programs and philosophies for middle school, the 1990s was the decade of curriculum. Research in the 1990s appears to be focused on more refined interdisciplinary curriculum and teaming, developmentally appropriate teaching and learning, and middle school teacher education.

Curriculum was the topic of greatest concern for middle school educators in the 1990s. The previous emphasis on grade level organization combined with developmentally appropriate programs and philosophies left extensive room for improvement in curriculum. Authors such as Manning (1997) and Beane (1991) discuss integrated curriculum as critical to middle schools. Manning (1997) proposes that the initiative be for curriculum integration to

go beyond interdisciplinary teaming toward integrated instruction, where information will be pulled in from the arts, humanities, and other areas, as well as from the big core four (p. 8).

While there are many proponents of integrated curriculum there are others who feel that integrated curriculum is not the most effective use of teacher time. Gatewood (1998) indicates that while integrated curriculum is important to

middle schools, it should not be the number one priority. He claims that classroom instruction is more critical and that more emphasis should be on

experiential, hands-on learning and higher-order thinking through active dialogue and discussion, open-ended questioning, and use of primary data sources in testing of hypotheses and reflective thinking (p. 27).

Erb (1996) proposes another argument, that the main problem is that no one can agree on what the term "integrated curriculum" means. (See Appendix A for one such definition.)

Researchers such as George and Alexander (1993) report that middle school practitioners propose that curriculum should be relative to the lives of students, integrate knowledge across the curriculum, focus on the process of learning, and presented so that students may learn from failure in an activity-based environment. However, George and Alexander (1993) state that while there has been significant change in the organization of teachers and students, very little has changed in the curriculum at this level. "Clearly, the status of the curriculum is on the minds of national leaders in middle school education" (George & Alexander, 1993, pg. 57).

Developmentally appropriate teaching is one of the issues discussed by the literature of the 1990s. Proponents of middle schools have long held that the 10 to 14-year-old was unique and that special developmental training was needed by

all who work with this age group. Authors such as Osuch (1997) indicate that "most education reform today is moving in the direction of the developmentally appropriate, child-centered approach (p. 282)." Many articles and texts including those cited in Chapter II emphasize the importance of addressing these needs in middle schools.

Another middle school issue of the 1990s involves the absence of teacher education programs specifically designed for middle grade teachers.

The percent of institutions that offer undergraduate middle level teacher preparation programs has increased from 23 percent in 1973 (Gatewood & Mills, 1973) to 38 percent in 1991 (McEwin, 1992b), a gain of only 15 percent in 18 years! (Dickinson & McEwin, 1997, p. 273).

The traditional configuration for teacher education involved only two major classifications: elementary and secondary. Teachers with elementary certificates and degrees could take additional classwork, or "add-ons," in specialized areas and to qualify for teaching in the middle grades (Dickinson & McEwin, 1997). Teachers with secondary degrees were certified to teach middle school. Middle school practitioners such as Dickinson & McEwin (1997) have lamented the exclusion of middle level teacher training.

Teacher education programs at the national level have traditionally excluded middle school degrees and course work. Manning (1994) proposes that

to provide developmentally appropriate instruction, prospective teachers first need a course focusing solely on development of 10 to 14-year-olds, and, second, methods courses emphasizing developmentally appropriate teaching-learning experiences (p. 47).

Middle School Teachers (1994) reports that a

study of over 2,100 middle school teachers in five states found nearly half had received no special training for teaching 10 to 15-year-olds (p. 72).

The middle school movement of the 1990s has concentrated on shaping and redefining programs to benefit students. Middle school advocates of the 1990s continue to strive for improvement in the integration of curriculum, developmentally appropriate practices for adolescents, and teacher education availability for middle school teachers.

#### Edwards 1990s

Rosewood's atmosphere is welcoming and pleasant. The entryway of the building is decorated with student artwork, including large pieces of artistically decorated furniture. The office has a sitting area remarkably similar to a living room. Student art is also evident on the walls of the office, and three-dimensional art sits on the counter. Student office aides offer assistance.

The teacher lounge demonstrates the administrative and parental regard for the Rosewood teaching staff. The round table in the lounge holds student art as a centerpiece. There is a couch corner complete with large mirror, table and lamp.



The room has a book border, which completes the homelike atmosphere. The bulletin board holds notices, but has more thank-you notes to teachers than anything else. The snack machines, microwave and two refrigerators further complement the room. Connected to the teacher's lounge is the workroom. Several teachers work on the computers and use the laminator as well as other items in the room. A new Rosewood teacher shares that it has been great so far this year because the teachers have been very open and have shared their materials and ideas with her.

The hallways of Rosewood demonstrate the camaraderie of teaming and the full use of teams. Each team has a name of a professional sports team. Banners, posters, and pennants line the hallways. In fact, each hallway has ceiling tiles holding triangular pennants that identify the team housed in the area. Banners are present throughout the building promoting middle school philosophies such as "We Nurture Talents and Encourage Growth." One disadvantage to Rosewood is the fact that the portable buildings create a situation where some teams are not housed together. The sixth-and eighth-grade teams are housed together in their respective wings. However, seventh grade has some teams split between the building and the portables. The science classes are in the building, as are two math classes and one English class. The rest of the classes are located in portable buildings.

The variety of instructional styles is apparent in the building through projects at various stages of completion sitting in the hallways. Classroom activities include group work, lecture, and independent work. Classroom walls exhibit previous projects, as well as works in progress. An accident in the hallway causes a slight mess as one student tosses her "baby" (a sack of flour) to a friend who misses. The walls are full of student work in each hallway. Classrooms show unusual approaches to teaching. One teacher has a chinchilla that is taken home each weekend and over the summer by students. Although this is not a formal lesson, but student responsibility is the goal.

The evidence of an appropriate environment for students is physically apparent. The library is set up to teach classes of students and has recently obtained Internet access. The walls of the library are full of encouraging, friendly messages about the values of reading. The librarian is busy with a parent volunteer trying to process new materials, so they can be placed on the shelf. The building is warm and inviting. Students appear comfortable as they change classes. The hallways are wide and traffic seems to flow normally, even though the school is 300 plus students over capacity.

The alternative-in-school-placement (AISP) class, where rule breakers are assigned, meets in what used to be a sunken conversation area. This was because the district had to use

available space within the school. The area was filled in and walls built around it to create an additional classroom. However, one wall is a window on the front of the building. Each student who is assigned to alternative-in-school-placement or after school detention is assigned to a study carrel. The room has a vaulted ceiling because its previous use was a part of an entryway. The room is open and brightly lit.

The elective classes are varied and cover many different areas. The art classes are divided into creative art, traditional art, and comic drawing. The physical education classes rotate each group through sports history, health, and physical education. The physical education rotation is based more on available space than on middle school philosophy. Orchestra, band, and vocal music are available as well. An additional group called "Leadership Core" is a service learning group that meets after school. Leadership Core students are encouraged to be involved with their school and community through volunteer projects such as baking cookies for the bus drivers, serving coffee and doughnuts to voters, collecting food for food drives, and many other like activities.

The parents support the encouragement and recognition of students by participating in Cougar Café, a pizza party for students selected by their teachers. Parents also check

lockers for cleanliness and leave a "Locker Bonus" treat in 36 clean lockers throughout the building each month. Additionally, parents have a club that supports school activities and programs.

Student success is monitored regularly in all classes. Students who are not doing well, have missing assignments, or require additional instruction, spend time in a program called "Teens on the Path to Success" (TOPS). TOPS provides students one-on-one tutorial time with a teacher. Each teacher has a plan time and a TOPS time every day. The TOPS time is during the students' elective time. If students are not doing well, they will be placed on a TOPS list for a set amount of time to improve grades. If a student is not progressing in TOPS, then Saturday School is provided. Teachers send home progress reports and monitor students' progress through weekly team meetings. Parents can request grade checks, and eligibility lists are updated every week.

Edwards has continued to grow throughout the 1990s and as a consequence, Rosewood is still overcrowded. Although a fourth middle school opened in 1989, each middle school houses close to 1,000 students. Rosewood has never dropped below 1,100 and has housed as many as 1,400 students. However, Rosewood was built to house only 900 students. Therefore, several portable buildings have been added to support the student population. Bond issues for new schools have been

required for the maximum amount of money available. State laws restrict the amount of bond issue money that can be owed by one district. However, every bond issue has passed since the 1960s.

As mentioned earlier, Rosewood was an outgrowth of "white flight" during the 1960s and 1970s. Racial demographics show the unbalanced racial demography of the school. 1997 statistics present 89% of Rosewood student population as White. African American population was 4%, Native American 3%, Hispanic 2%, and Asian 2%. Rosewood's demographics mirror Edwards continued cultural diversification. When asked about the racial configuration of the teaching staff, one Rosewood administrator stated,

It's awful. It's vanilla, like French vanilla. We probably have a couple of American Indians, and you have to look really hard to figure those out . . . We have had no Black teachers since I've been here.

Each individual who was interviewed answered the question of demographic changes with a reference to the federal subsidized housing projects that were built within the area, but few mentioned changes in numbers of minority students. When asked about the demographic changes Jones stated:

It's changed; we've got federal housing down the street . . . We have [Pine Tree] [a gated community built around a golf course of the same name] which are probably the richest people in the county . . . [In] 1976, the first Black student graduated from Edwards High School . . . It was less than one percent minority in 1976 and that included Native Americans . . . Now, we have about eleven percent minorities (Jones, IRB/OSU).

Rosewood's relatively clean cut, suburban image began to suffer from its proximity to a nearby teen hang-out. In the summer of 1992, the area surrounding Rosewood, which included a pizza establishment, movie theater, and ice cream store, had been nicknamed the "Danger Zone," according to The Daily MetroCity (6-5-92). Police had increased patrols after a fifteen-year-old was beaten by older youths. Parents brought students to the area so they could attend movies (or just to hang out). Jones stated in his interview that he recommended to parents that they not drop their children off in the area during the evenings because of potentially dangerous situations.

Teen violence, on the increase nationwide, also increased in Edwards (See Appendix C). In 1993, a community group that calling itself "Citizens for A Safe Edwards" established a task force to identify juvenile problems and develop feasible solutions. The group also consisted of fifteen student representatives as well as 25 parents, teachers, administrators, law enforcement officials, and community leaders. The Daily MetroCity (5-31-93) indicated that students were concerned about violence, drugs, and alcohol. Juvenile crimes have increased since 1991 (See Appendix C). Part of the crime increase can be attributed to the Edwards' population growth during the last ten years.

Growth and overcrowding have caused many difficult situations at Rosewood. Many long-time teachers attribute part of their success to their ability to stick together during these circumstances. It is interesting to note that several of the staff members have been at the school throughout its history. Evan Jones stated:

Out of the 85 staff members we probably have nine that are original staff members. We probably have half of our staff with 15 years experience or better and half of our staff at five years or less. Our staff experience ranks [as] one of the highest in the Edwards School System. We are at 12.3 years for average experience (Jones, IRB/OSU).

Jones attributes teachers' longevity to their teachers' professional satisfaction, community support, and administrative consistency within the school.

Jones is Rosewood's third and current principal. He is a very large, soft-spoken, bearded man who appears to genuinely care about students. Jones student-taught in 1976 at Rosewood, and thereafter, continued as a faculty member for three years. Later he moved to Fredrick Middle School as a teacher for one year (1980) and then as an assistant principal at that school (1981-1989). Jones stated, "I did apply for the assistant principal job at Fredrick [1980], but I was recruited to become principal at Rosewood [1989]" (Jones, IRB/OSU). Daniels described Jones' administrative style:

[He is] very committed to middle school philosophy, but [has] a very laid back personality. Just his outward demeanor is much more casual, quieter in his talk. [He is a] very good listener, slow to

jump to conclusions, thoughtful, and really and truly believes from the bottom of his heart that all teachers are intrinsically motivated from within and that we will always do the right thing (Daniels, IRB/OSU).

Jones does not fit the contemporary administrator mold. His remarkably calm demeanor, large, bushy beard, and winning smile set him apart. One teacher described him as "charismatic." It seems that this charisma almost caused trouble at the beginning of his term as administrator at Rosewood.

The advisory program was new in 1989. Teachers were expected to use twenty minutes to visit with students about personal issues such as careers, goal setting, and other classroom guidance topics. However, a man with such a striking physical appearance and gentle demeanor did not meet parents' expectations of a principal. One day a teacher turned off the lights to aid students' imagination of the future. However, when some parents heard of the activity they allowed their own imagination to create a myth wherein the teacher was perceived as the tool of this bushy bearded new principal. The point was career guidance. Laughing, Jones described an exaggerated parental perception that he might have invaded their community with some "New Age philosophy from California that was anti-Christian and anti-parent" (Jones, IRB/OSU). Providing parents with more information about the advisory program and its purpose cleared up this



misconception. (The advisory program continued at Rosewood for seven additional years.)

The reason why the parents had been upset was because Edwards was a conservative community and had a majority Christian citizenship. For example the town logo included a cross and a church as part of the design. Later, some citizens sued the city to remove the cross. "The U.S. Supreme Court affirmed Edwards lost battle to keep a Christian cross on the seal in May 1996" and directed that it be removed (The Daily MetroCity, 3-16-99). The most recent controversy took place over a 500-foot tall Christian cross that one church wanted to build on its property along a major interstate highway. Courts ruled that the present zoning restrictions did not allow for the cross' construction, so the zoning ordinance was changed (The Daily MetroCity, 7-21-97). Religion appears to be very important in Edwards.

Middle school philosophy has continued at Rosewood under principal Jones' guidance. Teaming and transition programs are still in place. All grade levels use the teaming concept, teachers meet weekly for team meetings, and share common student groups. Interdisciplinary units are implemented at least once every semester, and other teams utilize them more

frequently. Chris Chelly<sup>23</sup>, an eighth grade math and science teacher, said,

We try to plan one [interdisciplinary unit each] nine weeks, but sometimes it hasn't worked that way. Sometimes we might just do the science and math together or have a unit together with the history and English teacher (Chelly, IRB/OSU).

Varied instruction as employed by teachers may be modified by subject matter and the professional judgement of the instructor. The teachers interviewed talked about their teaching styles and their use of manipulatives, hands-on activities, lectures, and group learning. The advisory program, however, has come and gone.

Advisory was implemented with small groups as an advisor/advisee program in 1989. All teachers, administrators, and counselors were responsible for an advisory group consisting of fifteen students daily. However, because of the size of the student body, sheer numbers made it a logistical nightmare. This configuration of the advisory program required eighty classrooms but only 56 classrooms were available. Therefore, groups of fifteen students were not possible. After the first year, advisory students were assigned to core teachers only. The difficulty with this

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<sup>23</sup>Chris Chelly is a pseudonym for an eighth grade math and science teacher at Rosewood. Interview tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter cited as Chelly, IRB/OSU.

format required that each core teacher have approximately 30 students, and therefore it was not as effective.

During this time an additional key characteristic of middle school, exploratory curriculum, was implemented. It was implemented for several years. Each teacher was responsible for an additional thirty-minute course in a personal interest area during advisory. Daniels described this experience as great on paper:

But in reality, in real life, living it out, it never measured up for me with my experiences . . . In my head, it sounded wonderful. Each one of the faculty members would get to say these are the things that I do outside of my curriculum areas that I enjoy doing. It could be a hobby, interest or just a talent, and [they would] come up with a six, four, or nine week program [to teach during advisory] (Daniels, IRB/OSU).

But Daniels described the classes she taught as difficult, at best. The students in her landscaping class claimed that their mothers told them they did not have to go outside on the day they were to plant flower bulbs. Daniels financially supported the needlework class. Then the students could not finish their project in the time allotted and wanted to come in before class and remain after school. The aerobics class she taught was great for planning and materials, except the students did not want to sweat.

The advisory program was part of Rosewood's curriculum from 1989 to 1997. In that year the district implemented a plan to comply with a state mandate which required students be

academically prepared to enter the second level of a foreign language program in the ninth grade. This meant that foreign language instruction was necessary beginning at the fourth grade. The district plan required students to take a semester of Spanish in each middle school grade. This presented two obstacles to Rosewood's advisory program: time and money. Implementation of the foreign language program usurped the 20 minutes formerly used by the advisory program. It also took additional time from other core and elective classes. This meant a reallocation of funds.

Beth Davis,<sup>24</sup> an assistant principal at Rosewood from 1994-1998, stated, "Everything we lose on middle school is going to come down to a dollar" (Davis, IRB/OSU).

Prior to this time the advisory program had mixed results. Some teachers reported that they loved advisory and really miss that time. Chelly said, "I miss having that home base time. I think it's important to do advisory type of activities" (Chelly, IRB/OSU). Other teachers thought that twenty minutes of "down time" was not very productive. Teachers had been given a curriculum to standardize advisory material (such as topics to be discussed) in each class, but not everyone used the time effectively. Even after the elimination of the advisory program Jones continued to support

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<sup>24</sup>Beth Davis is a pseudonym for an assistant principal at Rosewood from 1994-1998. Interview tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma (IRB # ED-98-117). Hereafter cited as Davis, IRB/OSU.

the formal advisory curriculum. He asked teachers to incorporate the skills, ideas, and lessons into the regular classes. This worked well for some teachers. However, all teachers indicated their close relationships with students were becoming harder to maintain. This was primarily because of the loss of non-academic time to get to know the students better.

The current sports program complies with the middle school intramural philosophy, which requires that everyone participate. When the school opened, eighth grade still had varsity sports, and since it was in a separate building, it was easy to keep students separated. Rosewood had a variety of intramural sports: volleyball, football, basketball, track, flag football, chess, and table tennis. All students had an opportunity to play. Presently, many intramural activities are available to students, although some sports such as basketball, football, softball, baseball, and volleyball have reverted to intermural competition teams. This sports program includes other middle schools within the district and selected teams from the immediate area. However, if the students do not make the intermural competition team, they can still play on Junior Varsity, or second and third string. Rosewood and many other middle schools refer to these teams as B, C, or D teams. This way many more students get the opportunity to practice and play.

The reason for reintroducing competitive sports was because the community demanded an increased level of competition. Regardless of the parental pressures, Rosewood presently continues to permit all students practice and play sports, regardless of previous experience. They allow students to compete against each other and other B, C, and D teams in the district.

Programs and extra curricular activities are not the only problematic areas at Rosewood. Other money issues have challenged Edwards' middle schools as well. Middle school costs are greater than junior high costs, mainly because teachers maintain a plan and a tutorial class during their students' elective time. Middle school cost effectiveness was justified in Edwards recently. In 1997, a committee including administrators and teachers compiled a one hundred and eighteen-page rationale to present to the school board and superintendent. The portfolio used information from Turning Points (Carnegie Council of Adolescent Development, 1989) and included a summary of the importance of Edwards' middle schools. The committee report assisted the board in its evaluation of expanding the current model or redistributing grade configurations in Edwards in 1998. The Board presented two options to a separate committee to review: build a new middle school or replace the middle schools with fifth/sixth grade centers and seventh/eighth grade centers. The committee

recommended and the board approved the decision to build a fifth middle school, which was then supported in the bond election.

Despite the changes and difficulties, Rosewood teachers maintain high morale including teacher and staff involvement. There are several committees available from which teachers can choose such as school site improvement, technology, and staff development committees. Additionally, several teachers participate in a voluntary reading group arranged by Jones. They monthly meet on topics of their own interest. Jones also sponsors a student reading group. It also meets once a month, including the summer. Jones enjoys reading, as is evident by the number of books that line the shelves in his office.

The support staff is an important part of Rosewood. The custodians, cafeteria workers, and secretarial staff are included in end-of-the-year celebrations as well as staff meetings. Cafeteria worker Mrs. Alex stated,

They [teachers and administrators] try to include us in everything . . . In the past, some did not include us, but now they make us a part of Rosewood, like the parents do a making memories thing where they do things for teachers, like birthdays, and they include us (Alex, IRB/OSU).

Student attitudes at Rosewood have changed somewhat over the years. Teachers and staff describe Rosewood students of the 1990s as having very little respect for adults. As Susan Dawson, a history teacher who has been at Rosewood since it opened, observed:

I've seen a terrible lack of respect, just a terrible lack of respect on the part of the parents as well as kids. Kids who have no intention of minding and probably have no background in being taught to respect and mind just for the sake of keeping the learning process going. Kids have no desire to learn and they just cannot concentrate (Dawson, IRB/OSU).

In 1992, the Edwards newspaper reported gang-style beatings and local juvenile arrests for violence and weapons-related crimes both of which had increased significantly. According to Edwards police records, juvenile crime increased in 1992 and has continued to increase (See Appendix C). The most notable increase in juvenile crime was the jump from one arrest for a drug related crime in 1991 to 13 in 1992. In general, however, the numbers of juveniles arrested for crimes only represents a small percentage Edwards' juvenile population. Yet, despite the negative attitudes of some students, teachers indicate there are many respectful and appreciative students. Much of the difference between the problem student and the successful student is derived from parental influence according to teacher reports.

Parent involvement is high at Rosewood. Dawson said,

I think parents have been a big part of our team. It's easy to let parents be too much of a controlling factor but I don't think they really run the school. I think they have a lot of influence (Dawson, IRB/OSU).

When asked about middle school philosophy, the parents interviewed talked about the differences that they noticed,



such as teaming. Parent Michelle Smith<sup>25</sup>, talked about how much better middle school was for her children at Rosewood than at the middle school she remembered. Michelle Smith stated:

The team concept is really, really what I like best about this school. They have five or six teachers that keep track of one set [or] group of kids, and when they get together weekly they can communicate with each other. If one student is having a particular problem, it may not just be associated with that subject. It may be something that has happened at home, and everybody else is maybe noticing it. Then they can call home and find out if there is anything they can do special for this kid to get him back on track or whatever. I like it real well (Smith, IRB/OSU).

Trey Nathan<sup>26</sup>, a parent of a sixth grader, describe teaming for his daughter as a "community" or "family experience," really a sense of belonging (Nathan, IRB/OSU). Beth Davis, the assistant principal, indicated that:

Our parents' perception [about] what we are doing here is really good. But that has nothing to do with middle school philosophy.... I don't think we talk enough about it to them. We put it in the fifth- and sixth-grade orientation, and we probably put it in their newsletters occasionally, but I don't think we emphasize it enough. I think they're like sort of barely aware that it's different from what they had. It's not junior high (Davis, IRB/OSU).

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<sup>25</sup>Michelle Smith is a pseudonym for parent of a Rosewood student. Interview tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, Oklahoma. (IRB # ED-98-117). Hereafter cited as Smith, IRB/OSU.

<sup>26</sup>Trey Nathan is a pseudonym for a parent of a Rosewood student. All tapes and transcriptions are in the possession of the author according to the IRB, Oklahoma State University, Stillwater, OK. (IRB # ED-98-117) Hereafter cited as Nathan, IRB/OSU.

Parents interviewed were more likely to comment positively about the teaming concept than any other aspect of Rosewood. Beth Davis spoke of her parental perception of teaming:

I have a very, very, very shy, quiet, very-small-for-his-age son. He is exactly the one that would slip through the crack. I know that the team approach saved him because all I had to do was call one teacher, and it was shared with all five (Davis, IRB/OSU).

Not only is parental involvement high, businesses are also involved. The businesses donate gifts and educational materials to support the school system. Business partnerships are well represented in the community. Parents support the schools by passing bond issues, participating in school activities, especially sports, and keeping in close contact with teachers. Parent conference day is heavily attended, and parents schedule meetings outside of conference days to discuss their children.

Jones is currently the principal at Rosewood Middle School. He plans to stay. While Jacobs set the stage by hiring quality staff and Dr. Sanders implemented the key characteristics of exemplary middle schools, Jones has developed those programs and improved them. Additionally, Rosewood was recognized as a National Blue Ribbon School in 1996 under his tenure. Jones seems to have concentrated on maintaining high expectations through emphasizing a positive, safe climate for Rosewood.

### Analysis of Rosewood in the 1990s

The growth issues of the 1990s include a continued increase in the number of students in Edwards and Rosewood. More striking is the increase in disparity between state and Edwards' adult education levels and income averages. The movement toward exemplary middle school programs and philosophies has moved generally toward the improvement of this middle school. Currently, the administrative leadership is progressive. This is reflected with Evan Jones as Rosewood's principal.

The United States 1990 census reported that Edwards population was 52,315. The estimated population of Edwards in 1998 was 70,100 according to the Edwards Economic Development Authority (EEDA). The EEDA also reported that the income and education levels of Edwards' residents was higher than average. The per capita income in Edwards is \$24,057 which is well above the state average of \$16,418 (United States is \$20,124). The community education level is reported as over 28% of the over 25-year-old population having a Bachelor's degree and an additional 15% having graduate degrees. State education statistics report the state averages as 11% hold a Bachelors degree and 5% hold a graduate degree.

These statistics demonstrate that Edwards is a community growing at a significant rate, and its people have higher than state average salaries and education levels. This impacts the

schools because of the expectations of the community to provide a quality education. Parents are involved in the operations of the schools their children attend as well as the district. Many parents set high expectations for their children and plan for them to attend college, as they have done. This explains the high demand for college prep courses even at the middle school level.

Racial demography also helps to define the community. By race, Edwards reports a 91% White population in 1998. In that same year the state White population was 81%. The representation of races in Edwards includes 3% African American, 2% Asian, 2% Hispanic, and 3% other. This unbalanced racial configuration provides little experience in interracial relations. Students are minimally exposed to minorities within their school and may not be prepared to deal with workplace situations involving different cultures and races.

Yet, middle school philosophies and programs operate without reference to race or income. In Edwards, teachers provided suggestions for improvements, such as amount of time students spend in classes as well as smaller class size.

Assistant Superintendent Lynne Bryons, stated,

I think right now if you were to try taking teaming away from the middle schools in Edwards, it would be a major, major calamity. I think the teachers would rise up in arms (Bryons, IRB/OSU).

Rosewood has implemented most of the programs and subscribes to the philosophies outlined as "exemplary" by the

National Middle School Association. Rosewood has interdisciplinary teaming, varied instruction, and transition programs. Exploration programs, as defined by the NMSA, are not in place. However, varieties of electives are offered in nine-week rotations for sixth graders. An advisory program was implemented at Rosewood but was removed to allow for the state mandated foreign language requirement. Additionally, the curriculum as proposed by George and Alexander (1993) has not been a major focus of Rosewood nor school leadership. Curriculum at Rosewood has remained relatively unchanged since 1976 at the opening of Rosewood.

Jones fills the leadership role at Rosewood. Teachers stated that they thought he listened to their concerns and tried to assist in any way that he could. Mrs. Alex, the cafeteria manager, described Jones as

a pal to the kids, someone to talk to. Sometimes he is real psychological. They feel comfortable. He treats them like equals. He is a good person (Alex, IRB/OSU).

The leadership at Rosewood appears to encourage a developmentally appropriate learning environment and other middle school reform issues. Jones is aware of current middle school research and literature. He deepens his understanding of students through studying juvenile fiction. Jones stated, "If you really want to know what teens are thinking, read their literature" (Jones, IRB/OSU). Jones has continued to improve middle school reform programs, encourages teaming, and

provides staff development on important middle school issues. He has also dealt with the growth issues by addressing classroom overcrowding with district administration. He also assisted in proposing the fifth middle school for Edwards.

#### Growth and Desegregation Themes Analysis

Edwards has experienced significant growth in the past thirty years, which has impacted the size of Rosewood for the past twenty-two years. This growth created the need for a reorganization of schools in Edwards, which provided an opportunity for the middle school concept to be implemented at Rosewood. The community has added school buildings at a regular pace for the last thirty years. There are now three high schools, four middle schools, and 14 elementary schools in Edwards. Rosewood has felt the bite of limited space not only in the first building site of Rosewood, but the current site as well. Continued growth has affected the numbers of students and related activities. Rosewood has added portable buildings to expand classroom space. However, bathroom facilities, gym, and cafeteria space have not increased.

Desegregation of MetroCity was the primary cause of Edwards' growth. What started as a way for parents to avoid busing their children soon became a financial separation as well, because of the economic conditions of the early 1980s. Caucasians with money fled to Edwards, participating in the

"white flight" movement. These factors combined to create a disproportionate number of Caucasian families more affluent than the surrounding communities.

Racial issues were not voluntarily discussed by the interviewees even though questions demographics were asked. The most common response to this question involved reference to the economic changes brought about by low-income housing built in the area. This silence concerning race indicates that it is an uncomfortable subject or an ignored topic. Responses given about racial configuration of the staff at Rosewood indicated that it was white and remarkably so. Administrators indicated an awareness of a lack of minority teachers; however, no excuse or explanation was given.

Former superintendent Dr. Alton (1973-1987) intentionally hired minority teachers and had a minority parent group that he met with periodically to hear issues and concerns. However, the hiring of minorities for teaching positions at Rosewood was not proportional to the represented minorities in the student body. The school has an 11% minority student population and no minority teachers. The minority representation on the staff is limited to custodial and cafeteria staff. Rosewood, in the 1990s, is beginning to see additional increases in minority populations. This is a new development and has not been addressed, according to administrators and teachers.

Size has been an issue at Rosewood since its inception. Each time a new middle school was built, Rosewood experienced some relief only to have the continued growth of Edwards again cause overcrowding. Teachers and administrators commented on the lack of facilities at Rosewood to support the number of students and teachers. The physical education teacher teaches sports history, not because of student demand for the course, but because there is not enough gym space to house all the kids who want to take physical education. The restroom facilities were designed to support 900 students; despite increases in students and classroom space, there has never been additional restroom facilities. This sometimes causes lines of twenty or thirty students waiting to use the restroom.

Teachers indicate that size of the student body also contributes to oversized core teams, oversized sports teams, and many other size-related problems. One core team at Rosewood was an eight-teacher team with 170 students. "[This] made team meetings really difficult because not all of us teach all of the students" (Chelly, IRB/OSU). Overcrowded conditions make implementing any new program more difficult. Middle school programs such as advisory are more effective when there are smaller numbers of students. Evan Jones stated that "when advisory was first implemented it was a disaster.



Scheduling so many students into small groups was not possible which created the need for larger groups" (Evans, IRB/OSU).

#### Middle School Movement Analysis

Although Rosewood considers itself exemplary, it is not. It demonstrates an interest in becoming an exemplary middle school; however, it does not fit the criteria outlined by the National Middle School Association. The NMSA stipulates that the philosophy of an exemplary middle school "centers on the intellectual, social, emotional, moral, and physical developmental needs of young adolescents" (NMSA, 1996). Rosewood appears to subscribe to this philosophy as demonstrated by the child-centered approach espoused by the teachers and administrators. The physical environment of the school appears to provide for students pleasant work areas and creative expression through displays of student work. Classroom guidance is scheduled regularly and counselors are available to students. However, because of student numbers and limited space, physical developmental needs of all students may not be met at Rosewood. For example, physical education classes are not available for all students who would like to enroll.

Three characteristics of an exemplary middle school as outlined by the NMSA (1996) are demonstrated in part by Rosewood. Interdisciplinary teaming was found to be well

fused at Rosewood as well as varied instruction, as defined by the NMSA (1996). Rosewood has cross-age tutoring known as the I Teach program, cooperative learning, and student centered activities that are readily visible. Rosewood also has block scheduling, and developmentally-appropriate learning tasks. Additionally, transition programs, as defined by the NMSA, are conducted for fifth and eighth graders.

Two exemplary middle school characteristics as outlined by the NMSA (1996) are not evident at Rosewood. The advisory program is no longer in existence. Exploratory programs, which are defined as short-term exposure to a "range of academic, vocational, and recreational subjects for career options, community service, enrichment, and enjoyment," (NMSA, 1996) are not available at Rosewood. Both of these characteristics were evident in Rosewood's past but are no longer available.

Most practices outlined by the NMSA (1996) are evident at Rosewood. The NMSA (1996) believes that

developmentally responsive middle schools are characterized by: a shared vision, educators committed to young adolescents, a positive school climate, an adult advocate for every student, family and community partnerships, and high expectations for all (p.3).

All practices are apparent at Rosewood except for the adult advocate. Rosewood's large student population as well as the absence of an advisory program do not contribute to providing an adult advocate for every student.

Furthermore, the NMSA (1996) stipulates that developmentally appropriate middle schools provide:

a curriculum that is challenging, integrative, and exploratory, varied teaching/learning approaches, assessment and evaluation that promotes learning, flexible organizational structures, programs and policies that foster health, safety, and wellness, and comprehensive guidance and support services (p. 4).

Again, exploratory programs are not offered; however, a large number of electives offer some of the same services. The other services and programs can be demonstrated in Rosewood's organization, programs, and curriculum.

#### Leadership Theme Analysis

Rosewood's administrative leadership over the first twenty-two years impacted middle school philosophy implementation. Whereas Bobby Jacobs spent time trying to build a developmentally appropriate school for kids, Dr. Sanders and Evan Jones expanded his ideas and incorporated their own. Dr. Sanders entered the school with background in middle school research. She instituted middle school changes, which are still in operation on through Jones. Evan Jones has continued these programs and improved many that were instituted by Dr. Sanders.

Bobby Jacobs was a young inexperienced administrator who attempted to draw together the staff of Rosewood. Although many changes occurred, Jacobs was responsible for implementing

the middle school philosophy from which the foundation upon which Rosewood was built. However, the story about hiring someone with whom he played hockey seems to contradict his statements about hiring quality people. The hockey-playing geography teacher may have proven to be a great teacher; however, in retrospect it may give evidence of the "good-old-boy" mentality that drove hiring practices at Rosewood. This behavior demonstrates a somewhat rural, small-town approach to the school system at that time. It is also interesting that Jacobs talked about activities with the "male teachers" at the school and not about any faculty activities where women were included or women were hired. He did mention how hard his teachers worked and gave examples of women teachers and their classroom activities. However, no social interactions with women were mentioned as it was repeatedly with the male teachers.

Dr. Sanders was considered a driving force behind Rosewood's development into a "true" middle school. She is touted as the visionary behind the middle school reform movement as it was implemented at Rosewood. However, teachers also described her as "frightening" and many interviewees reported that teachers left because of the programs she implemented. To illustrate, a teacher who left Rosewood, but did not want to be formally interviewed, shared with me she left because Dr. Sanders was "awful to work for." She added,

"when you got a note to see her in your mailbox, you knew you were in trouble." Other teachers did not substantiate this feeling. However, teachers throughout the interviews included statements that Dr. Sanders was more structured, professional, straightforward, goal-oriented, and driven.

Notably, Evan Jones was described most often as more "laid back" than Dr. Sanders. However, some teachers had difficulty accepting this change because of the differences in leadership style (Kellum, IRB/OSU). Teachers indicated that Jones was "fair in listening to both the student and the teacher" (Chelly, IRB/OSU). As well, he was open-minded, especially when it concerned ideas for alleviating problems caused by overcrowding (Smith, IRB/OSU). Jones' style of leadership is remarkably different from Jacobs or Sanders. Jones is more often described as "child-centered," "having a big heart," "giving 100% to the kids," and "born to be a middle school principal." These statements describe Jones personal and professional characteristics, which lead me to believe that the teachers at Rosewood are pleased with Jones' leadership style. Jones has maintained and improved many of the middle school programs at Rosewood. Due to state mandates and overcrowded conditions, the advisory and exploratory programs were discontinued.

The administrative leadership of Rosewood was very important in making the transition from a middle school, which

more closely resembled a junior high school into a middle school that is attempting to become exemplary. Rosewood's administrators established and maintained a school that has a strong history of teachers working together to provide a quality learning environment with the intent of becoming an exemplary middle school.

This study traced the progress of Rosewood in creating a more developmentally appropriate middle school. The three principals established Rosewood in a organizational building approach. Jacobs was responsible for developing the skeleton of the school. He hired teachers and worked to shape the outline of a middle school. He knew some of the basic formats needed by middle schools and implemented basic items such as communication and increased counseling efforts. Dr. Sanders was the visionary that took the skeleton and molded the organs, tissue, and muscles of the body of the school. She instituted the major organs of what it takes to be a middle school such as transition programs, teaming, and advisory. Jones has provided the skin and exterior features of the middle school, gaining teacher and parental support as he built trust and climate.

## CHAPTER V

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

#### Summary of the Study

The purpose of the study was to trace and interpret the history of Rosewood Middle School as it attempted to move from a traditional junior high school concept to an exemplary middle school philosophy. Interviews, documents, and site visits provided the information necessary to detail this historical transition. It was found that Rosewood is not an exemplary middle school even though it maintains many of the programs and philosophies.

The guiding questions provided topics that were specifically explored in the study. The changes in philosophy and programs at Rosewood Middle School were documented through the 1970s, 1980s, and 1990s. The roles of administrators, teachers, and parents were explored and documented in the interviews. Additionally, the perceptions of change according to the administrators, teachers, and community were shown. Political, economic, and social factors significantly influenced the changes at Rosewood which were also documented through interviews, census reports, and newspaper articles.

The significance of this study is increased by the limited availability of research detailing transitions to an exemplary middle school. The National Middle School Association suggests outlines of exemplary middle school programs. This study provided evidence and examples of the difficulty in implementing these programs. This study also describes various people involved in the program evolution such as teachers, staff and parents. It discusses leadership styles of administration and how they deal with outside influences such as state mandates. A history of how a school attempts to become an exemplary middle school was developed.

Information was provided for this history from interviews, documents, and participant observations. The interviews provided the most information, because many documents were unavailable or not helpful. Participants volunteered for interviews. They had the choice of e-mail, telephone or personal interviews. Generally it was personal or telephone except Dr. Sanders who chose to write responses through e-mail. The methodology that was used in this study provided a human dimension to the philosophy and programs introduced at Rosewood.

The findings of the study demonstrated the effort of administrators, teachers and the community in transition of Rosewood from junior high school concepts to a middle school concept. Unfortunately, Rosewood is not considered an



exemplary middle school yet. Impacts on the creation of Rosewood include growth issues. This was because desegregation and white flight impacted Rosewood. The advancement of the middle school reform movement and the leadership of the principals also impacted it. The three principals discussed their roles in the changes that occurred at Rosewood. Leadership was found to be a critical component for instituting changes from the junior high concept to exemplary middle school programs and philosophies. Teachers, administrators, and parents provided information and expressed opinions regarding the changes.

Several themes emerged from the analysis of the study. The issues of desegregation and subsequent white flight were found to impact how the school came into existence and its current status. The growth of Edwards because of white flight based on desegregation significantly impacted Rosewood. Rosewood's philosophical commitment to the national middle school movement affected decision making at varying degrees. Also it became evident that differing leadership styles of the administration impacted Rosewood with various results.

### Conclusions

White flight forced Rosewood into existence. The desegregation of MetroCity created waves of whites fleeing into Edwards. This caused Edwards to deal with an exploding

school population. One of the tactics intended to accommodate the growth was the creation of a middle school in 1976.

The decision to create a middle school was based on available space. Dr. Alton indicated that the major problem was that most buildings used for secondary grades in the district could not house more than two grades. Because of physical plant limitations, it was decided that a middle school which housed sixth and seventh grade, might solve the problem. This would create a K-5 elementary, 6-7 middle school, an eighth grade center, 9-10 mid-high, and 11-12 high school.

Attention was given to the fact that middle school philosophy was becoming more popular. Dr. Alton had read several books on the establishment of middle schools and felt that it should be tried in Edwards. Additionally, Dr. Alton hired Bobby Jacobs because of his experience with middle schools. Therefore, the administrative leadership committed Rosewood to become a middle school.

Jacobs opened the school and established the groundwork for the school environment by creating a faculty that could work together although he only socialized with the male members of the faculty. Jacobs was responsible for establishing the structure of the middle school. He had worked in a middle school previously and thus worked on establishing policies that he understood best, such as sports. The communication and increased counseling efforts were based

on what he perceived as the most needed aspects of a developmentally appropriate learning environment. However, the only true middle school concept that he instituted was intramural sports programs where all students played. This was due partially to the availability of information at this time and to the general management skills of Jacobs. Jacobs stated his greatest needs were a way to manage such a large school and how to deal with all the people. In this early stage of leadership he did not take time to reflect on what needed to be accomplished after the initial start of the school. He stated, "I did not analyze any of it at the time. We were just doing it . . . it was just how we were spending our day. We were just going through" (Jacobs IRB/OSU).

In contrast, Dr. Sanders was female and gave direction by instituting middle school programs and concepts. Her professional manner and goal oriented directives apparently scared off some possibly less professional teachers. One example was the teacher who left because she felt Dr. Sanders was a "frightening" administrator. She was the visionary where middle school programs and philosophies were concerned. However, her manner of extreme professionalism kept her personally distanced from her faculty and staff.

Evan Jones appears to be inclusive of all staff and extremely tactful. He has been able to maintain and improve the implemented middle school programs, except the advisory

and exploratory programs. Jones has molded the programs to be functional and supportive for teachers and students at Rosewood. He keeps up to date with his staffs' personal issues and teachers indicated he was easy to talk to and very approachable. He has clearly established a positive climate for teachers and students. However, there are no minority teachers currently employed at Rosewood.

All three administrators appear to have demonstrated interest in Rosewood becoming an exemplary middle school. Differing leadership styles have molded Rosewood's strong teaching staff. The teachers have consistently overcome overcrowded conditions and still maintain a good community reputation. Through the efforts of administrators and teachers, Rosewood has been led gradually into the middle school philosophy.

A statistical study of "exemplary middle school characteristics" was not conducted at Rosewood Middle School. Rosewood was an illustration of the middle school movement that was going on across the United States at this time. This historical study of the progression of Rosewood Middle School as it attempts to become an exemplary middle school provides several lessons. One lesson is that becoming an exemplary middle school is a long-term goal. Schools need to see their small success in implementing pieces of exemplary middle school programs and philosophies as positive steps. Another

lesson is that an exemplary middle school follows current research and continually improves. However, it should be noted that there will be setbacks combined with successes. Middle school research is recent enough that new programs are being developed and studied regularly. Additionally, while middle schools have been established based on the definitions provided by the National Middle School Association, that definition has changed with additional research and experiences. For example, in the 1970s the NMSA established an intermural-only stance on sports at the middle level, now the NMSA proposes that all students play on the competitive intramural teams.

The key to program and philosophy changes at Rosewood appears to be the administrative leadership. However, teachers and superintendents can influence school programs and policies. Advocates of middle school reform need to realize they cannot go to sleep one night and wake up with an exemplary middle school. Time may be the factor that is the least understood; programs must be given time to work before they are discarded. The programs must be implemented with support of the teachers, administrators, and parents. Students will adjust to new programs easily because they do not have preconceived ideas about how school "should" be done. But parents, teachers, and administration must have visible evidence that the concepts, programs or philosophies do work.

The most important lesson to be learned from Rosewood is that setting a goal is the first step. When Jacobs started at Rosewood, he knew that a middle school was the intention. Therefore, he implemented programs he felt were important to middle schools such as intramural sports and counseling. Dr. Sanders entered Rosewood with a picture of what a middle school should be philosophically. She waited for opportune moments and gradually implemented program changes. Jones continued the programs and middle school philosophy that Dr. Sanders had established. However, Jones has further developed some of the programs and continues focusing on providing a developmentally appropriate, safe learning environment. Mr. Jones has been able to enhance positive school climate and relationships with students. Additionally, Jones has been faced with and has dealt well with a steadily increasing multicultural population of students.

This study demonstrates that knowledge, strong leadership, and goals must be present for schools to become successful. Knowledge of current research is critical in implementing change in education because of the demographic, social, and economic situation is in constant flux. Strong leadership is also a critical component in success, being able to establish confidence is necessary. Additionally, clear goals and expectations are necessary to determine the direction of the followers.

The most important finding of this study is that becoming an exemplary middle school is a process. As with any process, it has its ups and downs, plateaus as well as cliffs. Schools interested in becoming exemplary middle schools should note that it takes time and commitment. A school may not fill all the categories to be considered exemplary, and still be a good school. As long as a school continues to make progress toward the goal of becoming exemplary, it is an exemplary school in the making.

#### Recommendations for Further Study

There are several topics that were mentioned during the interviews that would be beneficial for future study:

- Leadership styles and their influence on implementing new programs would be an excellent study.
- A study of the relationships between students and teachers who do or do not have advisory programs would also provide valuable information.
- A study on the economic impact of implementing middle school programs would be interesting in relationship to the additional money needed to establish middle school programs.
- A study of the students' perspectives of middle school programs contrasting to junior high school

programs would be informative. This would provide a look at how students' view their schools and contrast the two types of schools.

- A study of communication within a school that uses middle school programs and philosophies as opposed to a junior high school program would be interesting. The teaming processes in a middle school facilitates a lot of additional time together planning with colleagues not provided by junior high school programs. Measures of communications within these schools would be interesting.

#### Concluding Comment

Middle schools are a component of educational history that link the elementary and high school experience. Programs that have been studied in the last thirty years concerning middle schools provide evidence that middle school age children are unique and complex. It is critical that a developmentally appropriate education is provided for them. Middle school programs attempt to provide this need.

The history of Rosewood has been a fascinating tale of survival and success. A researcher could easily identify the key components of the National Middle School Association exemplary middle school by way of a survey. However, it is



the story behind the test scores and statistics that indicates that more than quantifiable happenings have occurred at Rosewood.

Middle schools have been an often-ignored section of school history until very recently. Rosenzweig (1997) provides a list of publications on middle schools that is impressive. And, as Rosenzweig (1997) indicates, ten years ago it would have been difficult to gather many texts on the subject. The recent trend of studying middle schools demonstrates many different perspectives. The importance of educational research has demonstrated how far middle schools, such as Rosewood, have come during the last twenty to thirty years. Valuable lessons can be learned from history, which is why we study it in school. Studying the successes and failures of others is also a beneficial means of avoiding their mistakes and capitalizing on their successes. Rosewood is a prime example of a pioneer in the area of middle school reform.

This study attempted to provide an illustration of the difficulties and successes of one effort to implement changes characteristic of exemplary middle schools. Understanding the history of the middle school movement in relationship to the changing times assists in providing a context for the events at Rosewood. My hope is that through this research other middle schools may benefit from Rosewood's experiences.

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APPENDIXES

APPENDIX A

GLOSSARY OF TERMS

**Advisory Programs:** "Advisory programs consist of a small group of students (usually 20 or fewer) assigned to a teacher, administrator, or other staff member for a regularly scheduled meeting to discuss topics of concern to students. The purpose of this program is the development of close, trusting relationships between students and adults and to increase engagement with learning and feelings of positive self-esteem and belonging. Social and academic support activities "discussing problems with individual students, giving career information and guidance, developing student self-confidence and leadership, and discussing academic issues, personal or family problems, social relationships, peer groups, health issues, moral or ethical issues and multicultural issues/intergroup relations" (Mac Iver, 1990, p. 459). Teacher advisories also help create more positive school climates, develop student's self-concepts, and prevent dropouts (George & Shewey, 1994; Mac Iver, 1990)" (National Middle School Association, 1996 Research Summary #4).

**Advisory Time:** A regularly scheduled period each day in which students interact with peers and teachers about personal and school related concerns. Advisory is typically at least 20 minutes in duration.

**Blue Ribbon Award:** The U.S. Department of Education Blue Ribbon Awarded is award by the Department of Education to exceptional schools. Any level of school can aspire to be identified as one of the best schools in the nation. The award is given to schools across the country that establishes exemplary teaching and learning programs.

**Block/Flexible Schedule:** This should not be confused with high school block scheduling. Time periods are blocked off for teams to have four continuous blocks in which to organize team schedules. Block scheduling is flexible in that the teachers can change the schedule daily or weekly according to their needs. Schools who use block/flexible scheduling typically do not have bells between class periods as the teams schedule class changing time. An example would be for one team to do only two class changes in one day to allow for two continuous hours with their students. The next day students would attend only the two classes they missed, again for two hours. This allows for extended time periods for science experiments, class presentations, or other activities that take longer than fifty minutes.

**Common Planning Time:** Time during the school day during which a team of teachers who are responsible for the same group of students are available for joint planning, parent conferencing, and joint lesson preparation. Teams typically discuss student concerns, field trips, and

scheduling changes for flexible scheduling during this time.

**Core Curriculum:** The basic subject areas of math, science, social studies, and reading/language arts are considered the core, required curriculum. In some grades and states foreign language may be a component of the core curriculum.

**Core Team:** The teachers from the basic subject areas who share a common planning time and a common group of students. Typically found to be a teacher from each of the areas of math, science, social studies, and English.

**Cross-Age Tutoring:** Program where students tutor other students older and younger than themselves. Many times cross-age tutoring is accomplished with regular education students assisting special education students in the regular classroom.

**Developmentally Appropriate Education:** Developmentally appropriate education allows for the social, emotional, and physical needs of the student to be met in the inner workings of the school. The educational needs of the student should be considered in view of the social, emotional, and physical demands of the age group that is in question. In the area of the ten to fourteen year old, physical growth is a vital consideration in preparing an appropriate environment. Teachers and administrators, who understand the physical, emotional, and social needs of this age group should be able to monitor and adjust academic needs to better serve the student.

**Early Adolescence:** The stage of development between ages 10 and 14 when the student begins to reach puberty. As developmental levels of children are not static, some children may be considered early adolescents at a younger or an older age. The 10 to 14 age is a generally understood age of early adolescence.

**Exploratory Programs:** Other names for this program include exploration wheel or mini-classes. Exploratory programs provide short-term interest classes for groups of students. Some schools arrange for electives to be rotated on a six-week basis so that all students receive the opportunity to explore all the elective possibilities. Some schools provide a thirty-minute exploratory time during which students explore self selected topics. Examples of topics include foreign languages, intramural sports, health, clubs, student government, home economics, technological arts, independent study projects, music, art, speech, drama, careers, consumer education, creative writing, and several other special areas. Students are grouped according to interest.

**Exemplary Middle School:** The philosophy of exemplary middle schools rests on providing the intellectual, social, emotional, moral, and physical developmental needs of young adolescents. The organization of the exemplary middle school is defined by the National Middle School Association as based on "developmental needs (social and academic) of young adolescents, organized by interdisciplinary teams, with flexible organizational structures, and using varied learning and teaching approaches" (NMSA, 1996). Exemplary middle level programs foster appropriate programs, policies, and practices that foster the development of these tasks in positive ways. Characteristics of successful middle schools include interdisciplinary teaming, advisory programs, varied instruction, exploratory programs, and transition programs.

**Flexible Scheduling:** See block scheduling.

**Heterogeneous Grouping:** Grouping of students that do not divide learners on the basis of ability or academic achievement.

**Homogeneous Grouping:** Grouping of students that divide learners on the basis of specific levels of ability, achievement, or interest. Sometimes referred to as tracking.

**Interdisciplinary Program:** Instruction that integrates and combines subject matter ordinarily taught separately into a single organizational structure. This way of teaching provides teachers the opportunity to interact and relate lessons to other subject areas. Teachers on teams typically plan coordinating units of instruction with the same theme or project. One example would be a history report that is researched in the history class but written in the English/Language Arts class. Students receive two grades, one for each class, on the project.

**Interdisciplinary teaming:** Interdisciplinary teaming refers to the organizational structure of a core set of teachers assigned to the same group of students. A variety of configurations have been successful ranging from 2-5 team members in two, three or four subject areas. Teaming provides the structure to support developmentally appropriate teaching. Because teachers share the same students and have a common planning period, they are able to respond more quickly to the needs of individual students through collaboration, meeting jointly with parents, and designing thematic units.

**Interscholastic:** Athletic activities or events whose primary purpose is to foster competition between schools and school districts. Participation is usually limited to students with exceptional athletic ability. This is the

- most frequently found type of athletic activities in schools.
- Intrascholastic or Intramural:** Athletic activities or events held within the school day, or shortly thereafter, whose primary purpose is to allow all students to participate regardless of athletic ability. Anyone who wants to be on a team is on the team and plays.
- Mini-Courses:** See definition for exploratory program.
- National Middle School Association:** The National Middle School Association (NMSA) was established in 1973, to serve as a voice for professionals, parents, and others interested in the educational and developmental needs of young adolescents (youth 10-15 years of age). "NMSA is the only educational association exclusively devoted to improving the educational experiences of young adolescents" (NMSA, 1996).
- Self-concept:** Self-concept is the mental image one has of oneself. In effective middle schools increasing self-concept should be part of the planning of a successful middle school.
- Self-esteem:** Self-esteem is a confidence and satisfaction in oneself. In effective middle schools self-esteem building activities should be a part of the planning for a successful middle school.
- Service Learning:** Service learning projects take young adolescents out of the school into the community where they may assist preschoolers, help the elderly, help with environmental problems, work to improve community recreation opportunities, and so on. Service learning projects have the real potential to enlighten citizens about the competence of young adolescents and their capability to care for and about others. (Lipka, 1997)
- Traditional Junior High:** The traditional junior high is defined by the NMSA as organized by subjects and departments. "The many similarities between traditional junior high schools and senior high counterparts that persist in many schools today derive from educators' failure to understand and make commitments to schooling that is responsive to the developmental needs of young adolescents" (Stevens, 1992, p.14).
- Transescence:** "The stage of development which begins prior to the onset of puberty and extends through the early stages of adolescence" (Forte & Schurr, 1993). This term was coined by Donald Eichorn to delineate between children and late adolescent development. The term did not catch on and is not typically found in current literature.
- Transition Programs:** Transition Programs focus on creating a smooth change of schools for the young adolescent. A common approach is for elementary school students to visit the middle level school they will be attending,

while administrators of the elementary and middle level schools meet to discuss programs, and the middle school counselors to discuss ways to help students make a smooth transition from elementary to middle school and from middle school to high school.

**True Middle School:** The true middle school is a term previously used to identify middle schools which fulfilled the characteristics, programs, and philosophies outlined by the National Middle School Association.

**Varied Instruction:** "Varied instruction includes (1) integrating learning experiences, addressing students' own questions and focusing upon real life issues relevant to the student; (2) actively engaging students in problem-solving and accommodating individual differences; (3) emphasizing collaboration, cooperation, and community; (4) seeding to develop good people, caring for others, democratic values, and moral sensitivity (NMSA, 1995). Some of the more common programs include multi-age grouping over longer periods of time, cross-age tutoring, cooperative learning, hands-on and student-centered activities; use of block time and flexible scheduling; and positive evaluations. Learning tasks are developmentally appropriate and adapted to individual differences." (NMSA, 1996 Research Summary #4)



APPENDIX B

INTERVIEW QUESTIONS

1. Tell me about your teaching background and what you do at Rosewood?
2. How do you see middle school different than junior high?
3. What types of instruction or teaching styles do you use?
4. What do you think about teaming?
5. What did you think about advisory? Or tell me about your experiences with advisory?
6. Did you have experience with exploratory programs? If so, tell me about those.
7. Do you do interdisciplinary units? Tell me about those.
8. How are parents involved?
9. Do you think teachers have a voice in the changes at Rosewood? What about staff?
10. Tell me about the sports program at Rosewood.
11. Tell me about Rosewood's social climate.
12. What has changed since you have been working at Rosewood? How have students changed?
13. Has the socio-economical status changed?
14. Can you think of anything else that you would like for me to know about Rosewood?
15. If you were to read a history book about Rosewood, what would you expect to read about?

APPENDIX C

JUVENILE CRIME STATISTICS FOR THE CITY  
OF EDWARDS 1991 - 1997

YEAR	TOTAL ARRESTS	ASSAULT	BURGLARY LARCENY	DRUG RELATED
1997	339	16	97	39
1996	258	8	63	29
1995	298	12	104	31
1994	429	13	90	46
1993	378	6	86	27
1992	279	13	55	13
1991	249	8	53	1

\*Information provided by Edwards Police Department<sup>1</sup>  
(IRB/OSU)

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<sup>1</sup>Edwards Police Department is a pseudonym for the police department of Edwards. All locations are confidential according to the IRB, Oklahoma State University, Stillwater, OK. (IRB # ED-98-117).

APPENDIX D

MEMBERSHIP OF EDWARDS SCHOOLS

1964-66	3,230
1965-67	3,513
1966-68	3,704
1968-69	4,060
1969-70	4,430
1970-71	4,803
1971-72	5,193
1971-73	5,844
1972-74	6,043
1973-75	6,445
1974-76	6,839
1975-77	7,408
1976-78	7,860
1977-79	8,095
1978-80	8,254
1979-81	8,474
1980-82	8,913
1981-83	9,298
1982-84	9,766
1983-85	10,206
1984-86	10,706
1985-87	10,922
1986-88	11,454
1987-89	11,840
1988-90	12,473
1989-91	13,091
1990-92	13,755
1991-93	14,230
1992-94	14,715
1993-95	15,299

Information provided by Edwards Public Schools<sup>1</sup> (IRB, OSU)

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<sup>1</sup>Edwards Public Schools is pseudonym for the school system studied. All locations are confidential according to the IRB, Oklahoma State University, Stillwater, OK. (IRB # ED-98-117).

APPENDIX E

INTERVIEWED FOR STUDY

### Principals

(Listed Chronologically)

Bobby Jacobs: First Principal at Rosewood, 1976 to 1980. Interview by Telephone @ 1.5 hours. A follow up call was made for clarification of factual information.

Barbara Sanders: Second Principal at Rosewood, 1981 to 1989. E-mail responses to questions. A follow up telephone call was made for clarification as well as several e-mail follow up questions.

Evan Jones: Third and Current Principal at Rosewood, 1989 to Current (1999). Personal interview in Evan's office, @ 2.5 hours. Follow up visits to school site for clarification.

### Superintendents

(Listed Chronologically)

Dr. Alton: Superintendent of Edwards 1973 to December 1987. Personal interview at Dr. Alton's home in Edwards, @ 2.5 hours.

Dr. Ray Richard: Superintendent of Edwards, 1988-1995. Telephone interview @ 40 minutes. Conversation with Dr. Richards by author prior to telephone conversation.

Dr. Cox: Superintendent of Edwards 1996 to Current 1999, (Interim superintendent 1995-1996 is deceased). Personal interview in Dr. Cox's office, @ 1.5 hours.

### School Board Members

Terri Jarrod: Board President, telephone interview @ 30 minutes, no tape, just note transcripts.

### Assistant Principals

(Listed Chronologically)

Mark Grouse: Assistant principal to Bobby Jacobs, Telephone interview, @ 30 minutes.

Lynne Bryons: Assistant principal to Barbara Sanders 1985 to 1989, current district assistant superintendent. Personal interview @ one hour.

Beth Davis: Assistant principal to Evan Jones. Personal interview at her office @ one hour.



### Teachers

(Listed Alphabetically)

Brianna Bostic: first year teacher at Rosewood. Personal interview at McDonalds. Interview @ 45 minutes.

Leroy Carr: Science teacher at Rosewood. Telephone interview, @ 30 minutes.

Chris Chelly: 8<sup>th</sup> grade math and science five years at Rosewood. Personal interview at Rosewood Middle School, @ 45 minutes

Ovetta Daniels: Teacher at Rosewood 1984 to 1995. Personal interview @ 1.5 hours. Taught 6<sup>th</sup> grade science, 6<sup>th</sup> grade science/math, 7<sup>th</sup> grade science, and computer applications for 6 years.

Susan Dawson: 22 year teacher at Rosewood. 8<sup>th</sup> Grade American History teacher. Personal interview, @ 45 minutes

Brenda Day: Telephone interview @ 30 minutes, orchestra teacher.

Lorean Drake: Personal interview at her home in Edwards. Speech Pathologist at Rosewood for two years. @45 minute interview.

Martha Duke: Teacher at Rosewood, telephone interview, @ 45 minutes. Honors English and history teacher. 1980 to current.

Linda Frances: 21 year teacher at Rosewood. Personal interview at Rosewood. Interview @ 45 minutes.

Stacey Kellum: Teacher at Rosewood. Personal interview, @ 45 minutes. Currently teaching the I teach program, former English and reading teacher.

Tammy Kyle: Telephone interview Counselor. @ 30 minute interview.

Vicki Lane: Telephone interview, art teacher 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> grade. 21 years at Rosewood. @ 45 minute interview.

Angela Lee: Eight years in 6<sup>th</sup> grade reading, telephone interview

Mary Lions: Personal interview at Rosewood. Counselor at Rosewood for 9 years. About a 1 hour interview.

Donna Riggs: Teacher at Rosewood for one year. Teaching reading/writing workshop on sixth and eighth grade teams (switch at semester). Telephone interview @ 30 minutes.

Michelle Smith: first year teacher at Rosewood, prior parent of Rosewood student. Personal interview at Rosewood.

Victoria Stiles: Special Education teacher at Rosewood, 6 years. Personal interview at my home, @ 30 minutes.

Sarah White: Telephone interview, 17 years at Rosewood @ one hour interview. Science teacher.

#### Staff

Mrs. Alex: Cafeteria Manager at Rosewood 23 years. Telephone interview @ 45 minutes. No tape.

Wilma Greg: Cafeteria worker ten years at Rosewood and parent, telephone interview @ 30 minutes.

Patricia Julian: Superintendents secretary. Personal interview @ one hour.

#### Parents

Wilma Greg: Parent and employee (cafeteria for 10 years), telephone interview @ 30 minutes.

Trey Nathan: Parent of 1997-1998 sixth grade student at Rosewood. Telephone interview @ 15 minutes.

#### Former Students

Lee Carlson: Former middle school student at Rosewood. Telephone interview, @ 10 minutes.

Scott Greg: Telephone interview @ 30 minutes. Former middle school student at Rosewood, now at university ready to transfer to the Dallas Arts Institute

APPENDIX F

CODES FOR TRANSCRIPTION

R Rationale for becoming middle school  
L Leadership  
DA Developmental Appropriateness, Student Characteristics  
T Teacher characteristics, Social interactions  
C Curriculum, Instruction  
E Exploratory, Electives  
A Advisory  
P Parental involvement  
# Number of Students, Growth, Overcrowding, Size  
TM Teaming, Interdisciplinary teaming  
D Discipline, Behavior of Students  
G Guidance and Counseling  
S Sports  
SES Socio-Economic status, changes in demographics  
RC Racial  
PP Physical Plant, construction, moving, star time  
BJ Bobby Jacobs  
BS Barbara Sanders  
EJ Evan Jones  
SBD School Board  
TR Transitions  
CM Climate, personality of the school  
TP Tops, Saturday School  
MS Middle School Philosophy  
COM Community Involvement

APPENDIX G

INSTITUTIONAL REVIEW BOARD

APPROVAL FORM

OKLAHOMA STATE UNIVERSITY  
INSTITUTIONAL REVIEW BOARD  
HUMAN SUBJECTS REVIEW

Date: 05-13-98

IRB #: ED-98-117

**Proposal Title: A HISTORICAL STUDY OF THE TRANSFORMATION OF ROSEWOOD MIDDLE SCHOOL TO EXEMPLARY MIDDLE SCHOOL STATUS**

**Principal Investigator(s):** William Scgall, Kacy Harsha

**Reviewed and Processed as:** Exempt

**Approval Status Recommended by Reviewer(s):** Approved

ALL APPROVALS MAY BE SUBJECT TO REVIEW BY FULL INSTITUTIONAL REVIEW BOARD AT NEXT MEETING, AS WELL AS ARE SUBJECT TO MONITORING AT ANY TIME DURING THE APPROVAL PERIOD.

APPROVAL STATUS PERIOD VALID FOR DATA COLLECTION FOR A ONE CALENDAR YEAR PERIOD AFTER WHICH A CONTINUATION OR RENEWAL REQUEST IS REQUIRED TO BE SUBMITTED FOR BOARD APPROVAL.

ANY MODIFICATIONS TO APPROVED PROJECT MUST ALSO BE SUBMITTED FOR APPROVAL.

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**Comments, Modifications/Conditions for Approval or Disapproval are as follows:**

Adequate provisions have been made in this study to protect the participants' identities and responses. The reviewer sees nothing in the protocol which would pose greater than normal risk to those who will be interviewed. But, if they do, they are adequately instructed as to being able to withdraw. However, in this regard, the reviewer suggests that an addition be made to the Oral Solicitation and Informed Consent Form that withdrawal can be exercised without fear of penalty or other consequence.

The reviewer sees no reason why this study should not be granted "Exempt" status and allowed to proceed.

Signature: 

Chair of Institutional Review Board

cc: Kacy Harsha

Date: May 14, 1998

VITA

Kacy Lynne Harsha

Candidate for the Degree of

Doctorate of Education

Thesis: A HISTORICAL STUDY OF THE TRANSFORMATION OF ROSEWOOD MIDDLE SCHOOL TO EXEMPLARY MIDDLE SCHOOL STATUS

Major Field: Curriculum and Instruction

Biographical:

Personal Data: Born in Altus, Oklahoma, On August 28, 1970.

Education: Graduated from Owasso High School, Owasso, Oklahoma in May 1988; received Bachelor of Science degree in Elementary Education, Oklahoma State University, Stillwater, Oklahoma in 1992. Received Master of Science degree with a major in Elementary Administration from the University of Central Oklahoma, Edmond, Oklahoma in December 1995. Completed the requirements for the Doctorate of Education degree in Curriculum and Instruction in December 1999.

Experience: Taught fifth grade in Oklahoma City, Oklahoma for five years; employed by Oklahoma State University as a graduate assistant teaching foundations of education for one year; and currently employed as an assistant principal at Summit Middle School in Edmond, Oklahoma.