

ABSTRACT

The Contribution of John Lounsbury to the Development of the Middle School Movement in American Education: An Oral History

Sheila Rogers Gloer

Committee Chairperson: Betty J. Conaway

John H. Lounsbury is considered to be one of the founders of the middle school movement. His career began in the 1940's as a junior high school teacher. He later became one of the key leaders in the junior high reform movement and subsequently, a leader in the middle school movement. Although Lounsbury retired from his position as professor and dean of the School of Education at Georgia College and State University two decades ago, he is still actively involved in the National Middle School Association and is the senior publications editor for the organization. This dissertation describes his career and his contributions to the middle school movement and his understanding of key philosophical underpinnings. The dissertation also analyzes the impact of Lounsbury's work in molding the movement and how his work impacted other key leaders. Oral interview was the selected venue for this research because the interview process allowed for Lounsbury's own interpretation of events which he experienced.

Interviews with Lounsbury were conducted in 2005 and 2006. They were transcribed and analyzed along with interviews of twelve key leaders in the middle

school movement as well as interviews of Lounsbury's wife, Elizabeth Lounsbury, his executive assistant, Mary Mitchell, and high school best friend, Tom Rogers.

The following four research questions were employed in each interview:

- 1) What led Lounsbury and others to develop and promote the middle school philosophy?
- 2) What factors present in the 1950's and 1960's necessitated reform for the education of young adolescents?
- 3) What are essential elements for successful education of the middle level student?
- 4) What is the future of middle level education?

The responses to these four questions by all interviewees were analyzed and then organized into key themes. The analysis of these key themes brought about five important understandings which are discussed in the summary of findings. This dissertation describes and documents the significance of Lounsbury's career in shaping the direction and philosophy of the middle school movement.

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The Contribution of John Lounsbury to the Development of the Middle School
Movement in American Education: An Oral History

by

Sheila Rogers Gloer, B.S., M.A., Ed.S.

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Larry J. Browning, Ed.D., Chairperson

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Approved by the Dissertation Committee

Betty J. Conaway, Ph.D., Chairperson

Elden R. Barrett, Ph.D.

Larry J. Browning, Ed.D.

Lawrence B. Chonko, Ph.D.

Tony L. Talbert, Ed.D.

Accepted by the Graduate School
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J. Larry Lyon, Ph.D., Dean

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DEDICATION

To John H. Lounsbury,
for his faithfulness to the cause of quality education
for young adolescents everywhere

and

To W. Hulitt Gloer,
my husband, for his courageous example
and unending love

CHAPTER ONE

Introduction

Junior high, intermediate school, introductory high school and middle school are all names given to that educational schooling in-between elementary and high school. N.C. Heironomus (1940) author of “Is this the Earliest Known Junior High School?” indicated that the first intermediate school was constructed in 1895, while more conservative researchers suggested that these in-between schools first appeared around 1910 (Lemlech, 2002; Alexander, 1968). No matter when the first intermediate level school was built, the idea to create schools to serve three distinct time periods in a child’s life became popularly accepted around 1910. These schools were developed to better prepare students for high school and ultimately to achieve an earlier college entrance among other reasons which will be detailed in chapter two. The grade range served by each of these schools varied greatly, however, presently the most typical configuration is that of junior high serving 7th-9th graders and middle school serving 6th-8th graders. Much debate also occurred concerning the philosophical differences or purpose for the junior high and middle school. Van Til, Vars & Lounsbury (1961) suggested that there were at least two theoretical antecedents of the junior high. These were the “economy of time for earlier college entrance and later the best possible education for young people of the ages involved” (p. 21). Early leaders in the field of middle level education Alexander, Williams, Compton, Hines, and Prescott (1968) defined middle school this way:

To us, it is a school providing a program planned for a range of older children, preadolescents, and early adolescents that builds upon the

elementary school program for earlier childhood and in turn is built upon by the high school's program for adolescence. . . . It is a school having a much less homogeneous population on the criterion of developmental level, than either the elementary or high school, with their concentration on childhood or adolescence. . . . Middle school may best be thought of as a phase and program of schooling bridging but differing from the childhood and adolescent phases and programs (p. 5).

Although much of the early literature focused on the grade configuration of this new middle school, Alexander et al. (1968) concluded that an underlying rationale for establishing the middle school also existed. After surveying middle school administrators they concluded that there were three principal lines of justification for the emergent middle school:

1. To provide a program especially adapted to the wide range of individual differences and special needs of the "in-between-ager."
2. To create a school ladder arrangement that promotes continuity of education from school entrance to exit.
3. To facilitate through a new organization, the introduction of needed innovations in curriculum and instruction (p. 11).

John Lounsbury, Dean Emeritus at Georgia College and State University in Milledgeville, GA, and the publications editor of National Middle School Association, has played a significant role in the development of middle school education. To this day he continues to speak and write as an advocate for the development of effective schools for young adolescents. Lounsbury has been described as one of the founders of the middle school reform movement, which began in the 1960s (Manning, 1997, p.4). Sue C. Thompson (2004), the editor of one volume of *The Handbook of Middle Level Education*, wrote:

John H. Lounsbury began teaching in 1948 and 35 years later retired as Dean of the School of Education at Georgia College and State University.

After retirement the School of Education was named the John H. Lounsbury School of Education. That retirement was merely a technicality as he maintains a full schedule dealing with his special interest—middle level education. After 14 years as editor of *Middle School Journal* he headed the association's venture into publishing books and has produced over 100 books. He is known for his commitment and insistence that educators face the most significant, philosophical, value-laden questions. Dr. Lounsbury has presented all over the country as part of his effort to make the educational experiences of young adolescents more than mere schooling. The National Middle School Association named its most prestigious award after John H. Lounsbury (p. index of authors).

An examination of the contributions of John Lounsbury is essential to capture an understanding of the events surrounding the early development of the middle school and what became known as middle school philosophy. Such an examination would be incomplete without the inclusion of Lounsbury's perspective while he is still alive to present an accurate description and assessment of his own work. Norman K. Denzin, professor of Sociology University of Illinois, (1989) suggested that, "The meanings of experiences are best given by the persons who experience them" (p. 23). Oral history is the best method of research for this project to encourage and record the introspection which is required to capture Lounsbury's own perspective. As Yow (1994) explained, "In the recounting of events, the deeper layers of our thinking may be revealed, indicating the centuries' long development of the culture in which we have our being. For this, oral history testimony is a research method par excellence because the researcher can question the narrator, [and] . . . can ask a living witness" (p. 24). Interviewing, recording for archive and interpreting statements made by John H. Lounsbury is essential to a complete understanding of the middle level reform movement.

The Purpose of the Study

The purpose of this dissertation was to record the main events of the middle school movement and to understand the middle level movement through the eyes of one of its founders, John Lounsbury. This study focused on Lounsbury's rise to leadership in the movement and established an historical perspective from which to describe the middle school movement.

Recording the thoughts, recollections, rationale and remembered events which influenced Lounsbury as he edited the *Middle School Journal* and many other NMSA publications and as he later helped to design and implement a laboratory middle school in Milledgeville, Georgia was essential to understanding the middle level movement. This dissertation reports the analysis of discussions with Lounsbury about his work, his philosophy and about any turning points in his life which influenced his thinking about young adolescent education and which gave him the motivation to advocate for young adolescents and their quality of life. Using direct evaluation of the past through a triangulated study of documents authored by Lounsbury, interviews with Lounsbury, secondary sources written about him and also interviews of those who knew and worked with him, this dissertation answers the following questions based on John Lounsbury's perspective:

- 1) What led Lounsbury and others to develop and promote the middle school philosophy?
- 2) What factors present in the 1950's and 1960's necessitated reform for the education of young adolescents?
- 3) What are essential elements for successful education of the middle level student?
- 4) What is the future of middle level education?

As recently as October 2003, Lounsbury was referred to as a radical middle school activist (Yecke as noted in Anfara, V. A., p.1). Whether this statement is descriptive of Lounsbury or not, one must understand his philosophy in order to understand his actions, writings and the whole notion of the reform movement for which he advocates. This dissertation describes how Lounsbury has devoted over 50 years of his life advocating for quality education for young adolescents and, using interviews with Lounsbury and his associates, describes an understanding of why he continues to advocate for middle level education. In so doing, this dissertation highlights his accomplishments in the formation of the middle level movement.

Significance of Study

At the beginning of his career, Lounsbury focused his research on curriculum and the junior high school (Lounsbury, 1964). In 1989, he wrote an article in which he briefly described the history of the junior high school (Lounsbury, 1989, p. 92-93). He discussed four principal reasons for the development of the junior high and the historical time frame in which they were developed. These four reasons and the years in which they were a major concern were: 1) to teach college preparatory subjects earlier (1892-1918), 2) to revise and enrich the curriculum to encourage students to stay in school longer (around 1907-1911), 3) to bridge the gap between elementary and high school caused by differences in philosophy, curriculum and organizational structure (1911-1920), and 4) to meet the needs of young adolescents (1920-30). This fourth reason for development of the junior high became Lounsbury's mantra. He, along with several others, advocated a student-centered curriculum, aimed at producing a more developmentally appropriate education. Lounsbury spent many years studying the stage

of development between adult and adolescence called “transescence” or more commonly referred to as “young adolescence.” Lounsbury wrote, “That stage is the basis for intermediate or middle level education. Initially, the junior high school served this special age group. And although the junior high continues to serve young people well in many communities, its overall development has been disappointing” (Lounsbury, 1987, p. 45). This dissertation examines the distinctives of the junior high and middle school as defined by Lounsbury and asks what he believes to be the characteristics of the model needed to meet the needs of the young adolescent. The researcher reported Lounsbury’s responses concerning the characteristics of the time period in which he began to advocate for the specific curricular and organizational reform known as the middle school movement and reported Lounsbury’s comparison of these to the present time period as he shared his reflection and hope for the future.

Background for the Study

The term middle school has been used in Europe for a long period of time to mean the school period or term between grammar and high school. The term has been used sporadically for 100 years by educators in the United States to refer to education in the middle years of a person’s life, but not meaning any specific philosophy of education or grade level configuration. In July of 1963, William Alexander, chair of the department of education at George Peabody College for Teachers, made an historic speech at Cornell University calling for significant changes in the education of young adolescents. He made note of the characteristics of the junior high school that should continue, and “other characteristics to be sought in the middle school” (Alexander, 1963). This use of the term “middle school” became the rallying cry of concerned middle level educators for the

last half of the 20th century to describe the “new” school for which they advocated. Donald Eichhorn, (1974) Assistant Superintendent, Upper St. Clair Public Schools, Pennsylvania, suggested that the movement was not a new concept, “Rather, . . . it is a 70 year old concept rededicated to its basic principles. . . . Outstanding schools whether they are junior high or middle schools, have one common element: a program uniquely designed for the transescent learner” (p. 3). Eichhorn continued in this same article to discuss a “movement [which] has provided a fresh opportunity for concerned educators to create appropriate programs for the transescent learner. In addition, a dynamic instructional format, which encourages diversity and change rather than standardization and rigidity, is evolving” (p.4). This evolving educational program, the middle school, and those early proponents which sought to define and implement it, were the center of research for this dissertation.

Procedures

Walter R. Borg, (1963) who frequently has written about research methodology, wrote this about the importance of historical research:

[H]istorical research. . . . is important and necessary because it gives us an insight into some educational problems that could not be gained by any other technique. The historical study of an educational idea or institution gives us a perspective that can do much to help us understand our present educational system, and this understanding in turn can help to establish a sound basis for further progress and improvement (p.188).

Borg further suggested, “Historical studies often reveal that current practices were originally developed to fit situations and meet needs that no longer exist” (p.189).

Examining Lounsbury’s perspective of the middle school movement has enabled this researcher to assess whether such reforms are still warranted. This research also included

a careful assessment of critical evaluation of Lounsbury's work. The purpose of interviewing Dr. Lounsbury was to gather insights from him concerning his career, his philosophy of middle level education and to understand and record, from his viewpoint, the beginnings of the middle school movement.

A series of semi-structured, in-depth interviews were conducted by the researcher with John Lounsbury in his office in Milledgeville, Georgia at Georgia College and State University. The first series of interviews took place over a three-day period, during June 2005 with maximum 90-minute sessions two times per day reserved for taped interview. An additional one hour taped session was devoted to Mrs. Lounsbury, in order to gain information about Lounsbury's family life, as it pertained to his career and work ethic. A one-hour recorded interview was also conducted with Mary Mitchell, Lounsbury's assistant for 20 years. In order to present the most complete and accurate picture of Lounsbury's work, selected colleagues were also interviewed regarding Lounsbury's work, their association with him, and the early history of the middle school movement. The participation request letter is included in Appendix A. All participants signed the Deed of Gift (Appendix B) which is the required form of the Baylor Institute for Oral History giving permission and also deeding the tape recordings and transcripts of the interview to the Archive at Baylor University. Participants also signed a form containing additional information about the interview process, its purpose and the personal code of ethics of the researcher (Appendix C).

All interviewees were given the opportunity to read the transcripts of the interview and to then decide whether they wished to grant final approval to use their name and statements in the Baylor University Oral History Archive housed in the B.H.

Carol Library. At any time if a participant wished to stop the recording or not answer a question, s/he had the right to do so. When signing the Deed of Gift, all participants granted that their name would be associated with the recordings and written transcripts. No one was required to participate if s/he chose not to participate. All participants were informed that the Baylor University Institute for Oral History would retain final copyright of tapes and transcripts and that this researcher would be writing a dissertation from the collected material and would have the tapes and their transcripts sealed for five years following the completion of this project in order to have sole access to the material for future research and publication. The first day's question guide (Appendix F) focused on Lounsbury's personal education and life experiences, the second day's question guide (Appendix G) focused on his work in the late 50s through the early 70s and the beginnings of the middle level movement. The third day's question guide (Appendix H) focused on more recent developments in the middle level movement and Lounsbury's continued involvement through his position as publications editor for the National Middle School Association and advisor for the Georgia Lighthouse Schools.

Following this first three days of interview with Dr. Lounsbury, taped phone interviews were conducted with colleagues of Lounsbury. All interviewees were informed of the process and signed the Deed of Gift form (Appendix B). These interviewees were selected by first contacting co-authors and co-committee members with whom Lounsbury worked. Mary Mitchell, Lounsbury's assistant also provided a list of additional contact information. A "purposive snowball" sampling (Yow, 1994) was undertaken while taking care not to allow data to become saturated with "testimonials." According to Yow, purposive snowballing is the procedure by which the interviewer asks

the interviewee for names of others with whom she should talk and then ask those persons for additional names (See Appendix I-for the List of Participants). Phone interviewing continued until information seemed only to be repeated. A general phone interview guide was developed for these phone interviews based on the findings of the first in-depth interview with Lounsbury (Appendix J). After viewing transcriptions and further study of the information gained, a repeat three day visit was made to interview Lounsbury, to make clarifications and seek additional information where warranted. The validity and reliability of this type of study will be further discussed in chapter three. Methods of analysis will also be discussed in chapter three.

Definition of Terms

Middle School: Various configurations of school grades containing at least 6th and 7th grades but typically 6th-8th grades and sometimes including 5th grade.

Junior High School: Typically, schools with 7th-9th grades, but sometimes just grades 7th-9th, or 8th and 9th.

Middle School Philosophy: the philosophy which advocates for outstanding schools uniquely designed to meet the needs of the early adolescent learner, with teachers specifically prepared to teach this age without specific grade configuration. This philosophy is more clearly defined in four documents entitled, *This We Believe* . . . published by NMSA (1982, 1995, 2001, 2005)

Transescence: the age between childhood and adolescents—the time of vast emotional, social, physical and cognitive change—synonymous with pubescence, emergent adolescence, early adolescence, and young adolescence.

Constructivist approach to education: an instructional approach that encourages students to structure personal understanding through an active learning experience

Committee of Ten on Secondary School Studies: a committee formed in 1894 composed of five college presidents, one college professor, two private school headmasters, one public high school principal and the United States commissioner of Education who were charged to study the question, “Can school programs be shortened and enriched?” (Van Til, Vars, & Lounsbury, 1961, p. 6).

Committee of Fifteen: A committee formed in 1894 composed of mostly superintendents of large city school districts appointed by the Department of Superintendence to study the same issues focusing on enhancing the secondary program (p. 8).

Abbreviations

NMSA: National Middle School Association (NMSA) founded in 1973 is an organization of 30,000 principals, teachers, central office personnel, professors, college students, parents, community leaders, and educational consultants in 49 countries interested in the health and education of young adolescents. NMSA is the only national education association dedicated exclusively to those in the middle level grades.

ASCD: Association Founded in 1943, the Association for Supervision and Curriculum Development (ASCD) is a nonprofit, nonpartisan organization that represents 175,000 educators from more than 135 countries and more than 60 affiliates. Members span the entire profession of educators—superintendents, supervisors, principals, teachers, professors of education, and school board members. The association addresses all aspects

of effective teaching and learning—such as professional development, educational leadership, and capacity building.

NASSP: In existence since 1916, the National Association of Secondary School Principals (NASSP) is the preeminent organization of and national voice for middle level and high school principals, assistant principals, and aspiring school leaders from across the United States and more than 45 countries around the world. The mission of NASSP is to promote excellence in school leadership.

Ethical Responsibilities

In 1989, the American Historical Association issued recommendations about interviewing for historical research. These recommendations detailed in chapter three were followed to present the highest level of ethics and professionalism. The Baylor Institute for Oral History's guidelines (Appendix D) as well as the American Historical Association's recommendations for recording Oral History were followed (Appendix E). Also, the interviewer and interviewee agreed that anything said off tape would be considered as background and would not be used in direct quotation. The interviewee had the right to read all transcriptions of the interviews prior to final release.

The Baylor University Institute for Oral History and the Texas Collection archive found in the B. H. Carol Library is the archival repository for said tape recordings and transcriptions. These tapes and transcriptions will be sealed by the Institute for Oral History for five years following the interviews for this author's personal use. This is standard research policy for Baylor University's Institute of Oral History.

Limitations of this Study

This study will be limited to the intersection of Lounsbury's interpretation of his own efforts in the middle level movement, the understanding of his contributions by other early leaders and colleagues and the literature on the topic as an attempt to gain one particular perspective of the middle school movement, that of one of its founders and key players, John H. Lounsbury. The purpose of this study is not to present an exhaustive history of John Lounsbury's life nor to chronicle the complete history of the middle school movement in American educational history.

Of course as with all oral histories, memory may be a limiting factor to the study, however, every attempt was made to corroborate Lounsbury's story by interviewing others who were involved in the same events. This study was limited to Lounsbury's perspective which in itself could be considered a bias, but also seeking Lounsbury's perspective meant that some information could have been purposefully or otherwise withheld during interview.

The researcher studied middle school philosophy and young adolescent development for almost 20 years and taught middle school for 16 years prior to this dissertation. However, while previous study and experience served to enhance her ability to examine the significant issues, every effort to note bias because of this experience was examined. The author's previously held convictions regarding the middle level philosophy and approach to young adolescent education was critically examined in order to allow for maximum objectivity.

Conclusion

John Lounsbury is known as one of the founders of Middle School Education. An oral history of the formative years of this reform movement as seen through his eyes would be a foundational piece for a middle level archive. Connell Gallagher at the University of Vermont, which has established such an archive for middle level education, has already indicated his interest in any artifacts or transcriptions of this nature. (Gallagher, C. personal email, September 17, 2004) After the tapes and transcriptions have become “unsealed”, copies will be sent to the University of Vermont for the middle school archive.

Lounsbury’s passion and advocacy for effective education of young adolescents needs to continue to inform educators in this field. Future educators will gain insights for effective middle level education by reviewing his words concerning the foundation of this movement. This dissertation chronicled and analyzed the middle school movement from Lounsbury’s perspective and described the effects of his work on the efficacy of the movement. The experience of recording history was one that significantly enlightened this researcher’s life, work, and teaching and provided foundational information upon which future generations will be able to analyze the past in hopes of effecting quality middle level education in the future.

CHAPTER TWO

Review of the Literature Pertaining to the Middle School Movement

Introduction

When considering the contributions of John Lounsbury to the development of the middle school movement, one must have a general understanding of the historical developments of education in America and a more specific understanding of the history of the junior high and middle level movements. This review of literature includes a review of related historical events in the American education system that led to the development of the middle level philosophy and related discussion pertaining to teacher preparation, curriculum and grade configuration at that level. Literature on the development of the National Middle School Association pertinent to John Lounsbury's work is also included. John Lounsbury's works will be a part of this review, but in order to develop a clearer picture of the middle level movement which he has advocated for over 50 years, one must review programmatic, philosophical, and historical documents of the entire movement as well as material written by his critics. Lounsbury's own writings will be reviewed in the second section of this review of literature in a chronological fashion to aid in tracking his philosophical and practical views and the directions he took in relation to the national trends.

Early American Education

Colonial Era

The main purpose for education during the Colonial period of American history was to perpetuate the religions that the colonist had brought with them from other countries. Johanna Lemlech of University of Southern California (2002), wrote that religion was the “dominating influence on the education of the young in colonial America” (p. 21) from 1600 to around 1776.

Nationalist Era

During the Nationalist Period of American history, from 1776 to 1876, the purpose of education in America shifted its focus from teaching religious dogma and practice to the furtherance of democracy. Horace Mann spoke about education being the great equalizer and the “common school revival awakened Americans to the need to educate all children” (Lemlech, 2002. p. 26). As the nation expanded, so did the need for American education from 1876 to around 1930. There were many influences on the developing system of education from both within the country and abroad.

The American public school system did not follow a cohesive plan in its development. Elementary, secondary and higher education all developed independently and ironically, they did not develop sequentially as one would guess. Van Til, Vars and Lounsbury, (1961) reminded us that “Young men went to private colleges such as Harvard, founded in 1636, long before public secondary schools were organized. Many states could boast of universities prior to the establishment of the first public high schools” (p. 6).

Concern began to develop in these early universities about the efficiency of the secondary public school and about how much time it took for the preparation of young scholars for university. Van Til, et al. (1961) noted that Harvard University president, Charles W. Elliot, began to ask the simple question, “Can school programs be shortened and enriched?” (p. 6) commencing a major reformation in public schooling. President Elliot was named chair of the Committee of Ten on Secondary School Studies, a committee composed mainly of college associated personnel who commenced their discussions in 1892. This committee and its “[v]oluminous reports” (p. 8) suggested placing some high school subjects in what was then an eight year elementary program or to make elementary only six years and begin high school two years sooner.

The Committee of Fifteen was formed “mostly of superintendents of large city school systems” (Van Til, et al., 1961, p. 8) and in 1895 suggested moving some courses into the elementary school. The junior high or intermediate school was not part of their vision. Van Til, et al. (1961) reported that after this and other committees studied the issue a sub group of the Committee on Economy of Time in Education led by “Professor Suzzallo of Teachers College, Columbia University, recommended a 3-3 division . . . of the enlarged secondary segment” (p. 11).

Progressive Era

American educational historian, John Rury (2002) noted that the years between 1890 and 1920, often referred to as the Progressive Era in American education, were characterized by two broad reform ideas: 1) Pedagogical Progressives were characterized by a humanitarian disposition toward making education more responsive to the needs of children and integrating the school more closely with the community and 2) Progressive

Administrators were concerned with efficiency of learning and aligning the needs of the economy with the school's curriculum. The Pedagogical Progressives believed that education was supposed to be fun and stimulating. They followed democratic practice within the classroom. John Dewey, one of the most famous of all Pedagogical Progressives, focused on community and democracy within the walls of the school institution (Dewey, 1990). According to White, (1981) William Heard Kilpatrick introduced the instructional reform approach known as the "project method" (see also McMurry, 1920) just after the turn of the century. This project methodology was similar to present day integrated teaching, a major emphasis in the middle level model. The ideas of these Progressive reformers were quite influential to later middle school advocates as will be demonstrated later.

Rury (2002) also noted criticism launched toward Pedagogical Progressives by traditionalists centering on their experiential methods. Complaints were registered that experiential methods didn't teach children basic reading and computation and the field trip method of teaching social studies didn't provide students with essential names and dates. Some traditional English teachers complained that the Progressives aversion to drill and practice produced children who were unable to spell and punctuate properly. Traditionalists also charged that these experiential methods were more successful with affluent students and that the poor required more direction and control than the Progressives advocated (Rury, 147-148). By the late 1930s, Dewey found himself to be struggling to prevent misrepresentation of his theory and practice (Rury, 2002. p.148).

Committee work continued into the 20th century with the formation of the Commission on the Reorganization of Secondary Education, appointed by the National

Education Association. The Reviewing Committee of the commission consisted of 28 members whose positions varied from university professors to high school teachers and included the United States Commissioner of Education. The report, formed in 1917 and 1918 (National Education Association, 1928), begins with a statement of the need to reorganize secondary education in America because of the following three changes in American life:

Within the past few decades changes have taken place in American life profoundly affecting the activities of the individual. As a citizen, he must to a greater extent and in a more direct way cope with problems of community life, State and National Governments, and international relationships. As a worker, he must adjust himself to a more complex economic order. As a relatively independent personality, he has more leisure. The problems arising from these three dominant phases of life are closely interrelated and call for a degree of intelligence and efficiency on the part of every citizen that can not be secured through elementary education alone, or even through secondary education unless the scope of that education is broadened (p. 1).

This report included suggestions to reorganize the curriculum at the secondary level and to include a three year junior high.

Junior High Period

G. Stanley Hall, (1904) noted psychologist and education theorist of the early 20th century, argued in his book on adolescence, that teenagers were not just small adults, but had specific needs and characteristics. Hall discussed adolescence by stating that, “It is an age of exploration, of great susceptibility, plasticity, eagerness pervaded by the instinct to try and plan in many different directions” (1911, p. 545). As this notion of adolescence began to be discussed, American educators began to realize that there was a need for pedagogy that would address the special needs and characteristics of these transescent learners, those learners whose ages are between childhood and adolescence.

Another factor that brought an educational shift for the adolescent was the move away from the dominant agrarian society. Youth were no longer needed in the fields, and therefore, needed a useful occupation for their time. Susan Hynds (1997), author and professor at Syracuse University, mentioned an additional curriculum factor that brought attention to the need for specialized curriculum for youngsters:

Several social and economic factors led to the growth of the junior high school in the late nineteenth century. For one, there was a huge dropout rate prior to eighth grade, which was attributed to the fact that the later elementary grades were repetitive and boring. In addition, curriculum planners began to look for a way to introduce students to the structure of high schools, with their specialized subjects and content-oriented curriculum (p.73).

Herbert Kliebard (1995), author and professor of Educational Policy Studies and Curriculum and Instruction at the University of Wisconsin, noted that it was the work of Psychologists E. L. Thorndike and G. Stanley Hall who began to discuss differentiation in the curriculum. Their continued discussions later led to “the creation of a new educational institution, the junior high school, [which] was given special impetus by the perceived need to “explore” children’s needs and capacities before entering upon the high school period” (Kliebard, 1995, p. 94). In the early 1900’s, the elementary school (grades one through eight) and the four-year high school were the norm. That pattern, however, did not adequately meet the needs of adolescents. “Educators spent the next one hundred years trying to develop a successful school in the middle” (Manning 2000, p.192).

There is disagreement concerning the first junior high schools in America. Some have suggested that the first junior high was founded in Berkeley, California in 1910 (Spring, 1986, p.215). N. C. Heironomus (1940) made claim that the first junior high was actually begun in 1895. Other sources argue that the first three-year junior high

schools were established in 1909 in Ohio (Lounsbury, 1960; Stevens, 1967). These were designed to give enriched academic programs to the college-bound and vocational training to those who would be entering the job market. According to Lounsbury and Douglass (1965), during the mid-fifties the number of separate junior high schools rose dramatically from 3,227 to approximately 7,000. In his historical treatise of secondary education, Daniel Tanner suggested that, “. . . one of the chief factors in the growth of the junior high school historically was the economic problem faced by school districts with expanding enrollments at both elementary and secondary levels” (1972, p. 51). Building new buildings for an intermediate school half way between elementary and secondary would relieve overcrowding more economically than adding both elementary and secondary buildings; however, it did not guarantee that new programs would be activated. From the outset, teachers in the junior high school were paid smaller salaries than those at the traditional senior high because administrators reasoned that one had to know less to teach at the junior high. The junior high was staffed by teachers who “were prepared both by training and interest to teach at another level” (Hubert, 1973, p. 553).

The launching of Sputnik, the world’s first orbiting satellite, in 1957 became the impetus for education reformers to criticize the status quo. The American media suggested that the Russian educational system was the reason for the technological advance and soon sent out a cry to reform the American system of education (Kliebard, 1995). D.M. Kagan (1992) maintained that during the 1960’s and 1970’s, workshops and training programs had very little long-term effect on the professional growth of teachers, Robert Gillan (1978) stated the call for specially trained middle level teachers in this way:

If the junior high school student is indeed a unique individual in a school environment that is neither elementary nor secondary, then the teachers for the junior high school must be prepared in programs that are distinct and different from those of elementary teachers and secondary teachers. . . . The teaching staff of the junior high school has unusual responsibilities in working with children who are leaving childhood and emerging into adolescence, for them a new and complex situation. Thus a need obviously exists, in an institution with special purposes and functions, for an unusually well-qualified and specially trained staff (p.6).

However, Theresa Stahler (1972) of Ohio State University stated that the “junior high reform never came to fruition. By 1965 the call for the middle school [which would focus on the needs of adolescent students], was being heard throughout the educational community” (p. 18).

John Lounsbury, (1989) editor for the National Middle School Association, discussed four principal reasons for the development of the junior high and notes that this time period, between 1890-1920, was one of great change. These four reasons were: 1) to teach college preparatory subjects earlier, 2) to revise and enrich the curriculum to encourage students to stay in school longer, 3) to bridge the gap between elementary and high school caused by differences in philosophy, curriculum and organizational structure, and 4) to meet the needs of early adolescents. He summarized his discussion of the junior high with this discouraging notation, “Initially, the junior high school served this special age group, [refers to early adolescence] and although the junior high continues to serve young people well in many communities, its overall development has been disappointing” (p. 92-93).

The Middle School

Historical Development of the Middle School

Following much debate concerning whether the needs of young adolescent students were being met and how to better meet them, some early reformers of the junior high, were led to create newly designed schools and tried to implement some of the philosophical and structural changes espoused by reformers. Like the junior high, much debate surrounded the implementation of the first middle school because of the lack of an agreed upon definition of the necessary elements needed to constitute a “true” middle school. “While middle schools had modest beginnings in the early 1950s and 1960s” (Anfara, 2001, p. introduction, viii), most argue the first middle schools followed the historic speech made by William Alexander, chair of the department of education at George Peabody College for Teachers, in July of 1963. Speaking at Cornell University, he called for significant changes in the education of young adolescents. He made note of the characteristics of the junior high school that should continue, and “other characteristics to be sought in the *middle school* [italics added]” (Alexander, 1995, p.4). In writing about the history of American Education, Robert E. Potter (1967) wrote about the newly formed middle schools:

Communities in New York, Iowa, Florida, California and Massachusetts are experimenting with the “middle school”, [quotes in original] the middle grades on a 4-4-4 or a 5-3-4 plan. In New York City this is being tried as a means of reducing defacto racial segregation, but in other communities it is defended on the grounds that the elementary school is no longer challenging to many pre-adolescent 5th and 6th graders, and that they need an organization which permits greater flexibility (p.376).

In the beginning, the grade configuration or structure of the middle school was the drawing force. Many school districts jumped on this “middle school” bandwagon with

gusto because of the new possibilities of grade configuration change. Parent meetings were called and the new structure was announced. Stahler (1992) suggested three reasons for the tremendous increase of middle schools in the 1960's and 1970's. First, the tremendous growth in numbers of children after World War II and the increased number of kindergartens at elementary buildings again caused a space and economic problem. Creating a middle school by moving ninth graders to less crowded high schools and removing sixth graders from over crowded elementary buildings was a space problem miracle. Second, during the 1960's and 1970's the mandate to integrate schools caused districts to look to the middle school plan as a solution to administrators' problems. Students pulled from racially segregated neighborhood schools could be desegregated by mixing them together in a newly created fifth, sixth and/or seventh grade middle school. Third, the occurrence of an earlier onset of puberty for students was another factor considered in the creation of middle schools. Leaders in the move to include sixth grade in the middle school cited this early maturation as a reason (Stahler, 1992; Tanner, 1972).

The Middle School Curriculum

A resurgence of interest in research in adolescents and their unique educational needs came about in the 1980's. The Carnegie Corporation of New York established the Carnegie Council on Adolescent Development in 1986 to study the needs of students in these middle years and to bring these needs to the attention of the public. In 1987 a task force was formed to study the issue. This task force was comprised of educators, professors of education, researchers, government leaders, and health care workers. The council brought forward recommendations, which were presented in *Turning Points: Preparing American Youth for the 21st Century* (Carnegie Council on Adolescent

Development, 1989). Ten years later another group revisited the same issues and reported in *Turning Points 2000* (Jackson & Davis, 2000). The major recommendations of both of these studies were briefly summarized into eight points. These eight points, noted in both documents, are:

- Large grades should be divided into learning communities
- Teach a core of common knowledge
- Organize to ensure success for all students
- Teachers and principals have power to make decisions
- Teachers who are experts at teaching adolescents should staff schools
- Promote good health
- Families are allied with school staff
- Schools and communities are partners in education (2000, p.2)

These eight points became accepted as the basic requirements of all quality middle level schools. It must be noted, however, that the findings of *Turning Points 2000* (Jackson & Davis, 2000) suggested that many of the carefully researched recommendations of the original *Turning Points* (Carnegie Council, 1989) document had not been implemented. On the contrary, the pedagogical vision held by the Carnegie Council was not understood, and the school structure had been implemented without the accompanying researched curriculum changes. A survey in 1996 found more than twelve thousand middle level schools in the United States (McEwin, 1996). These schools were similar in grade inclusion (varying combinations of grades 4-9, but all included at least two of the middle grades); however, there was a wide range of what the schools termed middle level curriculum.

Addressing misconceptions about terminology associated with middle level education, Samuel Totten and Dennis Snider, (1996) suggested that over the years the term “middle school” moved away from a definition which signified the philosophy of meeting the unique needs of adolescents as stated in *Turning Points*, to merely a grade

organizational structure. There is still great diversity among the different schools labeled “middle schools” from the differences in their configuration and structure to differences in the very nature of the curriculum. Thomas Erb (2000) designed a framework for assessing the eight points of the *Turning Points* reforms, and found that many implementation problems still existed in the year 2000. He noted that the impact of the original *Turning Points* recommendations were incomplete because many schools had not implemented all of them, and assessment could not be completed where implementation had not occurred. In *Turning Points 2000*, (Jackson & Davis, 2000) the authors cautioned schools and educators against “half measures”. Many middle schools have adopted the basic structure including team organization, advisory classes, grade configuration and taken the name, but have not addressed major curriculum issues. This lack of attention to the curriculum and the other suggestions found in *Turning Points 2000*, (Jackson & Davis, 2000) was the concern of McEwin, Dickson, Erb and Scales (1995). They asserted that

[b]ecause of the lack of specialized middle grades teacher preparation programs and the licensure requirements that encourage and/or require them, the large majority of young adolescents are being taught by teachers who were prepared to teach other age-groups in other kinds of schools” (p.3).

Middle Level State Licensure or Certification

Most states in America provide two classifications of teacher certification or licensure, elementary and secondary. These two certificate levels may include any number of grade configurations and vary from state to state. Typically, teachers who wanted to teach grades at the middle level (middle school or junior high) were certified to

teach either elementary or a particular subject at the secondary level. Peter Scales (1992) wrote,

The awareness that young adolescents are developmentally different than younger children or older adolescents and therefore might need specially designed programs and policies gave rise to an obvious question: if young adolescents need special attention, what are we doing to ensure that the people who work with them get special training? Our review of the literature and the . . . data we collected suggest that the answer is, *not much* [emphasis added] (p. 208).

McEwin suggested that a “reason for [a] lack of specially prepared middle level teachers is directly related to the absence of mandatory middle level teacher certification/licensing in the majority of states” (McEwin, 1992, p. 372). McEwin cited his 1987 survey, which found 83% of all specialized middle level teacher preparation programs were located in states with specific middle level teacher certification or endorsement plans (McEwin, 1992, p. 373). An additional problem with state licensure lies in the diversity among state requirements. Some states provide overlapping plans for certification, which McEwin (1992) stated, “Open the door of opportunity for the establishment of specialized middle level teacher preparation programs. They stop short, however, of requiring those sorely needed programs” (p. 374). The probability that teachers will prepare for careers for which there is no license is highly unlikely. On the other hand, as states have developed a certification plan or endorsement for teachers in the middle level, the number of university and college teacher preparation programs has increased.

Alexander & McEwin (1988) noted,

Our surveys have shown clearly this effect; for example, in our 1981-82 survey only two of nine Kentucky institutions reported programs of middle level teacher education, but following Kentucky’s adoption of middle level certification in 1984, the 1986-87 survey identified 13 of 14 institutions cited recent certification changes or the lack thereof as the reason for having or not having programs (1988, p. 9).

North Carolina adopted a K-6, 6-9, 9-12 certification plan in the early 1990s, which has led to the almost universal establishment of middle level teacher preparation programs at both private and public institutions in that state (McEwin, 1992, p. 374).

McEwin, Dickinson and Smith (2002) warned that,

[d]ecades of experience have demonstrated that voluntary systems of add-on endorsements do not lead to the successful implementation of specialized middle level teacher preparation programs. State licensure agencies . . . are neglecting their obligations to the public, and specifically to young adolescents, when they fail to initiate and require special regulations that govern the preparation of middle level teachers (p. 44).

Even though this noted experience demonstrates the clear need for a middle level certification or licensure many states have not continued to move in that direction.

Teacher Preparation

In organizing standards by which middle school leaders could all agree upon, the National Middle School developed a document of beliefs by which all middle school teachers and schools could agree. These standards were organized and built upon in five documents of stated beliefs. The distinctive developmental characteristics of the young adolescent student demand varied teaching and learning approaches, assessment and evaluation that promote learning, and adults who are responsive to the needs common to those characteristics (NMSA, 1995, p. 16, 24-28). One of the constructs of the *This We Believe* (NMSA, 1995) document was that “Developmentally responsive middle level schools are characterized by educators committed to young adolescents” (p. 13). As NMSA responds to the needs of adolescents to have committed teachers, its leaders also call for those teachers to be well prepared to lead by providing challenging curriculum that is integrative and exploratory (NMSA, 1995, p.22-23). However, middle level

teacher preparation literature suggests that there is a dearth of specifically prepared middle level teachers (McEwin 1995; Scales 1992; Alexander 1988). In order to understand the preparation of middle school teachers one must also have an understanding of the beginnings and subsequent development of teacher preparation in America.

Earliest Teacher Preparation-The Normal School

In Lexington, Massachusetts in 1776, a shot was fired that was heard 'round the world. The American Revolution had begun. Just 63 years later, in this same famous village, another revolution was started. While more subtle and less explosive than the first revolutionary shot that was heard around the world, the effects of the teacher preparation revolution are also still being felt today. On July 3, 1839, in a building overlooking Lexington Common, the first State Normal School was established as a direct result of the work of Horace Mann, United States Secretary of Education (Cremin, 1969). The term "normal school" derives from the French *ecole Normale*, referring to a type of post-secondary school offering a course of study in fields not requiring university or professional-level studies and including some instruction in pedagogy (Unger, 2001 p. 755). The establishment of normal schools was the beginning of teacher preparation in America. In the beginning there were no divisions between elementary, middle and secondary preparation—all received the same training. Many of the teacher candidates were not even high school graduates themselves. The first three normal schools in America opened in the state of Massachusetts between 1837 and 1848. The first was in Lexington, the second in Barre, and the third in Bridgewater (Cremin, 1969. p.xiii). Much controversy arose over the need for such schools; however, early leaders in the

Lexington School were able to develop a successful course of training that helped to assure the continued favor of these schools in the legislature of 1840-1842 (p. xiv). This success was very important to the institution of teacher preparation programs across the country.

Normal Schools were developed and began to grow in other states as a response to a gradual recognition on the part of the public that a means of preparing teachers was needed in order to insure the fulfillment of the purposes for which common schools were created. The economic resources of the local community controlled the amount of schooling provided and the instruction offered (Pangburn, 1932). Despite the growing number of normal schools, G. Stanley Hall, educational theorist in the earliest part of the 20th century, criticized public schools for the “lack of professional training among teachers. Probably not forty percent of all teachers now in service have ever taken any courses in normal schools or had other professional training, and a still smaller percent have taken complete courses, and in some states this proportion sinks to ten or eight percent” (1911, p.576). The number of teachers who took courses in teaching steadily increased throughout the century with these normal schools becoming state teachers colleges in the early to mid 20th century with degrees in teaching being the predominant ones granted. In the late 20th to early 21st century many of these same institutions became part of state university systems with the degree of education being only one of many granted.

Middle Level Teacher Preparation Programs

In the mid-1980's, there was a flurry of popular attention given to the necessity of strong programs of teacher preparation, fueled by reports from the Carnegie Foundation on Education and the Economy, the National Commission of Excellence, and the Holmes Group. Scales (1992) reported, concluded that,

Most of the attention, however, [was] directed to the preparation of elementary and secondary teachers, not middle-grades teachers. . . . Beyond the middle grades community, however, much of the broader discussion among both educators and the public fail[ed] to address the preparation of teachers for middle grades (p. 208).

Concerned for the quality preparation of middle level educators, J.B. Hubert (1973) conducted a survey in which he discovered that special middle level preparation programs had existed for years; these programs, however, had not attracted many students. He concluded from his survey that an "image problem" was partially to blame for the lack of interest in teaching middle school students. "The problem with middle level teacher preparation programs lies not in their poor design but rather in their scarcity and low enrollments," added McEwin (1992, p. 375).

In addition to the lack of interest for teaching middle level students, Hubert (1973) also concluded that in-service teachers who had taken even just one college course on the history, purpose, and philosophy of the middle or junior high school had a more positive attitude toward middle grades teaching than those who had not completed this class. Almost three fourths of the teachers who responded to his survey had not completed even one course specifically related to junior high or middle school. Those who had at least one middle level specific course differed from the majority in their almost unanimous support of a sixth through eighth grade organization plan and

positively affirm the primary purpose of middle level education. The results of Hubert's (1973) survey suggested that even having one course relating to the junior high or middle school had significant effect on teacher's attitudes and values.

Although there has been sufficient need shown for specialized middle level education, it has not been universally and effectively implemented. Peter Scales (1992) studied 439 middle grades teachers, 86 school of education deans and state school officers from eight states reportedly following the recommendations of *Turning Points* (Carnegie Council on Adolescent Development, 1989). Only 17% of the sample had one or two courses specifically focused on middle level education. That 17% were asked to rate the adequacy of their preparation on eleven topics. Scales (1992) reported,

Areas such as diversity, interdisciplinary curriculum, cooperative learning, and teacher based guidance are among those in which the literature suggests middle grade teachers should have considerable facility, and they were among the worst-rated aspects of teacher education . . . Most illuminating was that even though the majority of teachers said their programs coverage of one basic topic, understanding early adolescent development, was at least adequate, this understanding was not translated into classroom behavior and action on curriculum and instruction (p.210).

Very few of those surveyed by Scales said their program adequately prepared them to guide cooperative learning. Two thirds of the respondents said that their preparation on cultural and language diversity had been inadequate.

Peter Scales suggested that there has recently been a renewed interest in the special preparation of middle level teachers. He believed that one reason for this was the dramatic growth in middle schools across the United States. For example, in 1964 there were 6,606 junior high schools (grades 7-9) and only a few hundred middle schools (grades 5 or 6-8). In the 1989-90 school year, there were only 1,680 junior highs and 6,451 middle schools. Dr. William Alexander and Dr. C. Kenneth McEwin (1988), two

of the most influential leaders in middle level education, suggested however, that the preparation of teachers for middle schools has not kept up with the growing need for teachers committed to teaching at this level. One of the lingering reasons for this might be an attitude problem during the junior high movement. McEwin (1992) suggested that the commitment to excellence at the middle level did not exist during the junior high school movement. He stated,

The residue of many actions and inactions that occurred during the first decade of the junior high school movement remains with us in contemporary times. Barriers established by tradition are extremely difficult to overcome in education. Those associated with teacher preparation are certainly no exception (p. 371).

Teacher preparation for the middle level and the attitudes associated with this preparation have not progressed to keep up with the changes brought about by growing need and research concerning transescent learners.

William Alexander (1988, p. 2), noted four special dispositions needed by the middle level teacher. They were: (1) understanding of the characteristics of the age group and competence to deal with them; (2) competence to teach in an organization which is somewhat unique to the middle level—interdisciplinary teaming; (3) mastery of both the skills of learning and of their teaching at the middle level; and (4) other unique responsibilities requiring special understanding of, and commitment to, the middle level school. The middle level teacher also faces the unique responsibility of role of advisor, referral agent for counseling, leader of special interest groups, and guide for elective activity. These special dispositions clearly suggest the need for special training.

Alexander (1988) stated, “Especially challenging is the fact that students who leave the middle level without adequate skills for high school and beyond are those most likely to

drop out of school at the first opportunity or if they stay, [they become] the most reluctant and poorest students” (p.3). This urgent cry for quality middle school teaching only accents the need for prepared teachers.

On the other hand, McEwin (1995) suggested that teachers who were prepared in special middle grades programs were likely to have program components considered essential in middle grades teaching. The more courses these teachers had taken, the more likely they were to rank their own preparation highly. Dickinson and McEwin (1997) also noted that special mandatory middle level teacher licensure does seem to lead to the development and implementation of special middle level teacher preparation programs.

Since educators and psychologists alike recognize that children at different development levels have common needs and interests, teachers should be trained to work specifically with those developmental stages. This has been the basis for early childhood, elementary and secondary curriculum studies. There is also recognition that early adolescents have specialized needs (Carnegie Council on Adolescent Development, 1989; Jackson, A. & Davis, G., 2000) and therefore, teachers who plan to teach these students need specific programs geared specifically to learning how to meet those needs.

Carmen Giebelhaus, (1998, p.1) of the University of Dayton, suggested four reasons for the reluctance on the part of teacher education programs to initiate middle level specific programs. First, she suggested, that the narrowing of focus or preparation would limit graduates employment abilities. Second, she argued that new elementary standards were addressing the concerns of middle level proponents over developmental understandings and subject matter concentrations. Third, was her concern that there

would be an inadequate knowledge base to bring to the classroom. Her fourth reason for reluctance in developing middle level teacher preparation programs was the cost factor.

Dickinson and McEwin (1997, p.1) suggested that the reason for the reluctance of universities to begin middle level teacher education programs is a complex issue with many factors. They proposed the following twelve factors:

1. Ignorance about adolescent special characteristics and needs.
2. Insufficient advocates
3. Desire for plentiful supply of teachers licensed to teach ANY group
4. Lack of public knowledge of middle level curriculum
5. Expense of beginning new teacher preparation programs
6. The limited number of model middle level teacher preparation programs
7. Problems real or perceived with other teacher preparation programs
8. Willingness of school districts to hire teachers prepared other than in middle school specific programs
9. Licensure regulations that do not require middle level preparation
10. Lack of prestige for working with this age (adolescents)
11. Undiminished appeal of teaching younger students
12. Interest in single in-depth subject education (1997, p. 1)

If states would require a specialized state licensure or certification for teachers at the middle level, most of these factors would no longer exist to deter college and universities from beginning specialized programs of middle level teacher preparation.

Before teachers specially prepared in effective middle level teacher education programs will teach all young adolescents, McEwin and Dickinson, (1995, p. 15-16) suggested several prerequisites must be met. They suggested that teacher preparation must undergo major reform using exemplary field based settings which are specialized for the young adolescent learners. Renewed commitment to early and continuing field experiences, interdisciplinary/multidisciplinary teaching and mandatory middle level licensure for anyone teaching at the middle level must be strong and unwavering.

McEwin and Dickinson also suggested that the attitude that “anybody can teach the

middle grades with any kind of teacher preparation” (p. 15) must be eliminated. Only professionals who have a “deep knowledge of middle level teaching, should serve as instructors and advocates” (p. 16). All teacher preparation programs must be carefully examined to assure best practice teaching strategies and wide and accurate knowledge base are present. Bureaucratic decisions for quickly filling empty classrooms with teachers who are not prepared specifically for middle level must not predominate.

In 1996, the Professional Preparation and Certification Committee of National Middle School Association (Swain & Stefanich, 1996) conducted a study and published a subsequent monograph, which was written to aid schools of education in developing and improving middle level teacher preparation programs. Significant events were noted as those that indicate progress made towards the quality of middle level teacher preparation.

- A majority of the states now have some type of middle level licensure/certification
- There are now NCATE guidelines for middle level undergraduate, masters, specialist and doctoral programs.
- Several significant studies (Butler, Davies, & Dickinson, 1991; Scales & McEwin, 1994, McEwin, Dickinson, Erb, & Scales 1995; Swain & Stefanich, 1996 chapter 2) were completed concerning middle level teacher education and certification
- NMSA (McEwin & Dickinson, 1995) issued a position paper supporting the preparation and certification of middle level educators.
- The National Association of State directors of Teacher Education and Certification (NASDTEC, 1993) adopted middle level outcome-based standards to assist states in developing consistent middle level certification standards
- The National Board for Professional Teaching Standards (NBTS, 1992) formed several committees to develop standards specifically to address various areas of middle level teaching

Having celebrated these successes, however, Swain & Stefanich, (1996) noted that in order to be successful states need to provide initial licensing for middle school teachers that minimize any overlap with elementary and secondary licensure. Also, states

must require beginning teachers to have a middle level license to teach in designated middle level grades and certification standards must be developed which allow middle level teachers who currently do not have a middle level license to obtain a middle level certification. Many good self-taught middle level teachers are presently teaching.

However, the research suggests that teachers who are prepared through successful teacher preparation programs are more successful. McEwin, Dickinson and Smith (2002), suggested that specialized training also accounted for middle level teacher retention:

Although no sustained research effort has focused on the relationship between specialized middle level teacher preparation and teacher retention, it seems logical that middle level teachers who wish to teach young adolescents and who successfully complete specialized middle level preparation programs are more likely to remain at the middle level as a career choice. It stands to reason that teachers who are prepared in ways that enable them to be successful in their practice are more likely to find satisfaction in their work and remain longer in the field (p.40).

Content of the Middle Level Teacher Preparation Programs

The transitional time period in an individual's life known as tranescence brings many special needs which an effective middle level education should address. There has been much discussion in the literature about the essentials of good middle school programs. National Middle School Association, (1995, p.11) stated in the *This We Believe* document, that developmentally responsive middle level schools must have educators with a shared vision of high expectations for all students and who are committed to young adolescents. These schools must have family and community partnerships, adult advocates for every student and a positive school climate. To be developmentally responsive middle level schools they must provide a curriculum that is challenging, integrative, and exploratory with teachers who use varied teaching and learning approaches, flexible organizational structures, and assessment and evaluation

that promote learning. Programs and policies that foster health, wellness, and safety as well as comprehensive guidance and support services must be a part of the effective middle school.

If middle level teachers are going to meet the needs of the middle level student identified by NMSA, the essentials to good teacher preparation must be identified. Alexander and McEwin (1988, p. 48) used surveys, interviews, and a review of research to compile a list of these essentials. They considered the thorough study of the nature and needs of early adolescents, middle level curriculum and instruction, broad academic background, including concentrations in at least two academic areas at the undergraduate level with specialized methods and reading courses, and early and continued field experiences in good middle schools to be essential elements that middle level teacher preparation programs must provide beginning middle level teachers. These recommendations demonstrated that just knowing adolescent characteristics and their needs is not enough. A middle level teacher must know how to use these characteristics to develop sound curriculum and classroom practices. She must know the diverse physical, social, emotional and cognitive characteristics of young adolescents and therefore, know how to challenge some with complex and abstract reasoning tasks, while at the same time providing concrete tasks about the real and immediate for others. Middle level teachers must know that the relationship of the peer group is very strong in young adolescence and at the same time young adolescents are self absorbed. Therefore, teachers must be comfortable with designing exploratory units with opportunity for students to research their own views on social issues of the day that have personal implications. Knowing that grouping is a powerful strategy with this age group is not

enough unless the middle level teacher is also taught grouping strategies. Middle level teachers must be able to translate the basics of adolescent development into specific teaching and assessment techniques.

In an article discussing his research with the DeWitt Wallace Reader's Digest Fund and the Center for Early Adolescence at the University of North Carolina, Chapel Hill, Peter Scales (1992) mentioned that the center developed thirty-three recommendations for improving middle grade teacher preparation after having surveyed teachers, administrators, and teacher education faculty in eight states known to be leaders in middle level teacher education. The five top recommendations reported included 1) the offering of earlier, lengthier and more varied field experiences and student teaching with mentors selected for expertise-not availability, 2) covering a greater variety of teaching and assessment techniques with opportunities for group and authentic assessments such as student portfolios and exhibitions, 3) including more on young adolescents' social relationships and self-awareness concerns and physical, cognitive, social and emotional development, 4) providing more in-depth coverage on classroom management strategies including movement needs, and 5) emphasizing academic subject content more deeply. These recommendations concur with NMSA recommendations.

Necocheea, Stowell, McDaniel and Lorimer (2001) suggested a systems model of teacher preparation for preparing middle level teachers to work in diverse settings. In this model, seven interactive components were suggested. First, in

order to become committed to the establishment of caring communities during their teacher preparation, pre-service teachers should experience the benefits of a sense of community themselves. This is unlikely to happen with the typical style of independent courses taught by faculty who act as self-sufficient operators within a competitive environment of institutions of higher education today. To model a sense of community,

higher education teachers should model planning together themselves (p.164).

Those who help to prepare the future middle level teachers must practice what they preach. Nocochea, *et al.* (2001) “contend that having teams of teacher-educators who make connections among their own academic disciplines makes an indelible impression on prospective middle grades teachers” (p. 170). Second, equity for young adolescents can only be achieved by preparing future teachers to be effective in and committed to the struggles of social justice and excellence. Third, teachers must model exploratory practices. Fourth, in addition to requiring specific courses in adolescent development, middle level philosophy, and integrative and developmentally responsive instructional strategies, these areas must be connected to fieldwork. The rationale behind this thinking is explained this way:

Pre-service middle level teachers must begin to form philosophical underpinnings during their teacher preparation coursework that will guide them throughout their teaching careers. These habits are not quick to manifest themselves nor are they mastered by virtue of one lesson in a methods course. These habits should, serve as a spiritual renewal to help develop the knowledge skills and dispositions for effective middle level teaching. Incorporating these habits into their daily practice will carry pre-service teachers through their journey as middle level educators. These habits will also help them endure the vicissitudes of the pendulum swings of educational reforms (Necochea, *et al*, 2001 p. 176).

Fifth, partnerships must be experienced in the teacher preparation programs which prepare pre-service teachers for teamwork in effective middle schools, building the knowledge, skills, and dispositions necessary for future teaming. Necochea, *et al* suggested that the best way to “combine the energy of the pre-service teacher and the wisdom of knowledgeable and dedicated teachers, the support of administrators, and . . . teacher educators” (p. 173) is through the professional development school. Sixth, good

habits of the mind and heart are created through reflective practices between mentor teachers in the field, peers, and education faculty. These life long habits help to create teachers with positive attitudes, ones who are life long learners, and who are agents of change. These teachers will know how to build democratic classrooms and will be motivated to increase the opportunity for quality relationships with peers, students and other professionals. These habits are what reinforce the commitment to excellence that is needed in the field today. Seventh, middle level pre-service teachers should find experiences to practice service learning, which helps to make the home/school/community links necessary to a complete middle level preparation.

Another suggested component of middle level teacher preparation is familiarity with adolescent literature. When teacher candidates connect with a character in juvenile fiction, the reader's world expands and issues take on a new significance. Adolescent development comes alive when contextualized within a specific situation. The experience of reading this literature provides the pre-service teacher with opportunity to broaden perspectives about physical, social, cognitive, and emotional issues. In a study by Stanulis (1999), adolescent literature provided an appealing avenue to help teacher candidates build connections between theory and the gap in their own experience. This reading then becomes a virtual experience. When teacher educators model the thoughtful integration of adolescent literature, teacher candidates will also think of ways to use literature across content areas in their own classes (Stanulis, 1999).

Lynn Hart (2002) of the University of Georgia suggested that a true test of an effective teacher preparation program is whether the graduates of the program can do more than "talk the talk." She suggested that because students have many years of

observing teaching methods prior to coming to the university, schools of teacher preparation must “study how consistent the beliefs teachers espouse after participating in a program are with their teaching practices” (p. 2). The teaching of pedagogical philosophies and teaching strategies should match the way content courses are taught or the teaching pedagogy is diluted and the chance for change and the use of effective teaching strategies is decreased.

William Alexander suggested, in the past there has been an accepted regard for the High School teacher as being the content teacher, the elementary teacher as the grade teacher, and now the middle level teacher as the team advisor. “But relatively few teachers now teaching middle level schools have had experience as a student or teacher in a school organized on an interdisciplinary team basis” (Alexander, 1988, p.2). Therefore, there exists a great need for observations and experiences. The use of virtual or media type experiences would be helpful. Alexander also emphasized the importance of preparation for working with large and small groups and individualized instruction through the use of flexible scheduling and shared space plans.

Jerry Rottier (1999) described an interdisciplinary teaming pilot program at the University of Wisconsin—Eau Claire. The program consisted of two to three teaching associates or student teachers with each interdisciplinary team of mentor teachers. The purpose of this pilot was to teach student teachers how to plan, organize, evaluate, and manage a middle level classroom. The secondary goal was to involve these students in activities within all disciplines. The hope was that this experience would break down barriers and cause them to be comfortable with interdisciplinary opportunities in future classrooms. Each student was assigned to a team but also to a mentor teaching in the

students' area of preparation. This mentor had the role of a traditional cooperating teacher. One of the earliest assignments in this experience was to shadow one middle school student for an entire day. The purpose of this was to introduce the associate to all of the classrooms and to view the school experience from the student's perspective.

Following this pilot program, Rottier concluded that:

1. Not all mentors utilized the talents of the associates
2. There was adequate time for working in the concentration area
3. This idea works best when the associate can stay a full semester and does not need to also complete an experience in another field.
4. In this experience, there were students seeking 1-9 & 6-12 certification. In some situations these students were together in the same team groupings. Both associates and cooperating teachers found this generated interesting ideas as they worked together.
5. The special education associates stayed in one class all semester with another teaching associate and were involved with the team.
6. Teaching associates with particular scheduling conflicts caused some restrictions however, these problems were resolved.
7. Overloading of teacher associates was a potential problem.
8. Steps were taken to schedule teaching associates so that students were not with associates for their entire learning day.
9. Time was scheduled to make sure that mentors and teaching associates were freed for lengthier blocks of time for reflection and planning.
10. This pilot used two mentors per teaching associate during the semester. The effectiveness needs to be studied.
11. The mentors were willing to begin a second semester. (1999, pp. 447-452)

Generally speaking, all those involved with this pilot study were pleased with the outcomes, and two of the first semester teaching associates have become team leaders in their present teaching positions. These specific conclusions should be used as foundational guidelines for other middle level teacher preparation programs.

There is an overwhelming agreement with regard to the need for quality field experiences for middle level teacher preparation (Alexander, 1988; Butler, 1991; Dickinson, 1997; NMSA 1991). Butler, Davies, & Dickinson (1991) stated it this way:

In the profession of teacher education at any level, there is no quarrel about the necessity and inherent validity of early field experiences and student teaching; the rationale, the theoretical and practical bases for meaningful field experiences have long been identified and supported by both research and professional wisdom. Middle school experiences are no exception (p. 3).

Generally, field experiences are beneficial because they are life laboratories.

They are opportunities to practice the key concepts of pedagogy. A second general benefit is that field experiences allow the participants and supervisors a continuing link between school and university. New ideas and creative thinking enliven both arenas. A specific middle level context, however, is essential to the preparation of middle level teachers for the following reasons. First they can verify the learning of adolescent development issues. Candidates can see how the structures of curriculum, buildings, structures, and schedules positively impact the learning of these adolescents. Second, because many studying to become middle level professionals do not have a positive background of experiences in contemporary quality middle schools, these experiences are essential to model ideals and professional standards. Third, candidates must be exposed to the positive role model of a cooperative, creative, positive encourager of learning, who is a knowledgeable committed professional that can be found in a model middle school. Butler, Davies, and Dickinson (1991) maintained that there are practical reasons for field experiences also. When negative stereotypes exist, a quality field experience can dispel them. A good supportive middle school field experience challenges candidates to be open minded and willing to consider this potentially rewarding level of teaching. The requirement of quality field experience in the middle school can also raise the visibility of the importance of specialized training in adolescent development and specialized strategies in classroom management and teaching.

Field experiences without reflection are much less valuable than when one reflects on what was positive about the experience, what was negative and what or how the experience needed change. Micki Caskey (2000) suggested that the field-based model at Portland State University in partnership with the North Clackamas School District is an example of effective teacher preparation because the element of reflection has been built into the program. Caskey wrote,

[E]xpansive field based experiences can empower pre-service teachers to reflect upon their own performance as it directly relates to students, teaching them to make informed instructional decisions. Consequently, student teachers are better prepared to meet the demands of the teaching profession (p.1).

Deborah Daniels (2002) of the University of Central Florida commented that most pre-service teachers are people who were generally successful in school and so, therefore, they chose to stay there and become teachers. Since many of those teachers continue to teach in the manner in which they learned, schools look like they did 50 years ago. Pre-service teachers find it easier to remain constant with the same practices by which they were taught and not challenge the conflict they feel between newly learned and accepted philosophies and the practiced way of teaching. Since one can often identify the discrepancies in another person's espoused beliefs and their actions more readily than one's own, engaging in reflective practice with the mentor teacher, the university professor, and reflection on journal articles will help future teachers to align their practice with their teaching.

Preparing pre-service teachers for understanding and working with educationally disadvantaged students is another difficult undertaking. Charles Bacon (1992) of Indiana University—Purdue at Ft. Wayne, observed pre-service teachers during a field experience

in which they were engaged in a one on one tutoring program with middle school students who were two or more years behind their peers. He conducted interviews with the pre-service teachers. For most of the pre-service teachers, this was their first experience working with academically disadvantaged students. Bacon noted, “The major difficulties the pre-service teachers saw within this group of students were a lack of attention and a lack of motivation” (p. 12). Pre-service teachers observed that if these students had an adult with them then they were willing to work. Student teachers also noted that they must conceive of more creative ways to think about conveying information to their students, but overall, they left believing they now were more able to be responsive to the disadvantaged and there was more willingness to work with students who have substantial school problems.

Nancy Freeman (2000) Assistant professor and director of the Children’s Research Center at the University of South Carolina, wrote “offering tomorrow’s teachers instruction in professional ethics is critical if we are to prepare them to face the increasingly intense scrutiny that comes with accountability, autonomy, and professional recognition” (p. 12). Freeman suggested that ethics should not be viewed as an add-on but as a cornerstone of the pre-service teacher education program. The problem is that the field of education does not have one specific code of ethics that can be taught, learned and practiced as do other professions such as medicine or law; yet teachers need to be taught these skills. In fact there is a plethora of teachers’ codes of ethics; for example there is a code of ethics for teachers of singing and teachers of sports, for teachers in South Dakota, Texas, Michigan, Minnesota, Georgia and New York, for those in the Association of American Teachers and those in the National Education Association, for

Registered Teachers, for teachers of students with Visual Impairments, for Music teachers, and teachers of Early Childhood. One specific teacher code should address the kinds of ethical dilemmas that teachers are likely to encounter and all could know and follow this one code. Freeman suggested that these ethical codes needed to be differentiated from policies and employee guidelines that are specific to the hiring institution. Because teachers “have power over their students; . . . [the teacher’s] personal morality and values are not enough to guide their professional practice. All educators have responsibilities to students, parents, colleagues, and society” (p. 12), so therefore a code of ethics is a valuable tool to guide them. The challenge to instill one code or standard of ethics to teacher preparation is formidable. Character Education advocates Kevin Ryan and Karen E. Bohin (1999) suggested that most who enter the field of education do so with the notion that they will somehow make children better people, yet they feel that programs of teacher education are sorely lacking in preparing pre-service teachers to help their students become better people or people of character. Having dispositions of good character and modeling virtue are qualities that pre-service and in-service teachers need to possess. Freeman suggested three ways to teach these professional ethics to pre-service teachers: 1) include an examination of ethical issues in courses across the pre-service curriculum, 2) add pro ethics instruction within field experiences, and 3) cognitively develop approaches for direct instruction and teach the skills needed to apply these techniques systematically. Focusing “on professional ethics demonstrates their commitment to pre-service teachers, their future students, the profession of teaching, and the larger society. They are doing the right thing for the right

reasons, and their students and their students' students will benefit from their efforts” (Freeman, 2000, p.18).

Current Middle Level Teacher Education Programs

The status of several teacher preparation programs at institutions in South Carolina were improved through the restructuring by the South Carolina Middle Grades School State Policy Initiative (SCMGSSPI) through a grant given by the Carnegie Foundation of New York. South Carolina is one of the many states where specialized certification for teaching in the middle grades is not required. Therefore, reformers who were a part of the SCMGSSPI recognized the need for well-prepared teachers and worked toward the establishment of teacher preparation programs in the state. The reformers' agenda contained four primary objectives. First, they worked to identify and involve college and university leaders in the state to take the initiative and give it direction. Second, they developed a plan to mobilize educators concerned with middle level education from the lower and the upper ranks of educational institutions and state organizations. Third, they sought to identify public school educators who were committed to the middle level philosophy proposed in *Turning Points*. Fourth, they worked to provide opportunities for funding and collaboration, inquiry, and evaluation leading to reform in middle level teacher preparation. One of the major issues that confronted the reformers was to get universities to move ahead with programs in middle level education when there was not a state mandated certification to require teacher to enroll in these programs. Another problem was the lack of knowledge on the university faculty and the middle level practitioners about each other's areas. The reformers also saw a need for the arts and science faculty members to embrace the middle level

philosophy and teaching strategies and this was difficult to achieve. The teacher education faculty was also short of recent middle level experience. This was seen as a stumbling block for quality preparation of the pre-service teachers. Finally, there was the hurdle of continued funding to finance field experiences and the specialized preparation program. In spite of these issues, the follow up surveys indicated that the programs made favorable progress. Five of the eleven institutions involved in the project made commitment to offer middle level programs with specialized courses. An important outcome of this project is the fact that the state began discussion about state licensure for middle level educators (Cormier & Wiseman, 1998).

Based on the notion that teachers teach in the manner they were taught, the Maryland Collaborative planned for a teacher preparation program where math and science pre-service teachers would be taught in the manner consistent with a new vision of teaching for middle level students. Instead of discussing pedagogical issues, the instructors focused on creating the type of learning experience that would be most effective. In other words, content area instructors would be modeling good middle level teaching strategies to teach math and science to their college level teaching candidates. At the conclusion of the study, candidates stated that instructors modeled good teaching and the candidates knew this because they had learned more than in a typical class. Teacher candidates made four basic observations of their learning experiences. First, they found the lessons had been more interactive using manipulatives and equipment. Second, they noted that the lessons had made connections to real life situations. Third, candidates observed that instructors had paid closer attention to the learners and their needs, and fourth, the instructors encouraged students to find and verify solutions on their

own. Although learners noted that they learned the information better, the instructors noted that the classes moved too slowly. Others questioned whether it was appropriate to discuss pedagogical issues in content courses. One factor important for the study is that candidates were aware of their own superior learning. Perhaps they would use these teaching techniques when they become teachers, but the study did not address long-term effects (Watanabe, 1997).

Noting that new teachers trained in current pedagogy quickly abandoned that pedagogy and fall back on lecture and workbook teaching methods, Valdosta State University in Georgia decided to address the problem. Prior to 1992, two-week middle grades field experiences were associated with methods courses and a ten-week student teaching experience was completed in the senior year. The faculty believed that additional experience in the classroom was needed to help teacher candidates develop confidence and familiarity with the pedagogy in which they were trained. In the fall of 1992, Valdosta State implemented a more intense field based program that included 470 clock hours of field experience with a mentor teacher, in addition to the 10-week student teaching component in the senior year. The purpose of this middle grades field experience was to immerse seniors in middle school philosophy and practices. Three phases characterized the experience: observations, participations, and teaching. Administrators and mentors reported that the candidates were more confident and that they were better prepared than with the past program. Graduates commented that they liked being guided through situations by a person with experience. They learned things which they were not able to learn sitting in a college classroom. There were also a few negatives reported. The candidates and mentors felt that mentors needed more training

and that sometimes pre-service teachers became overloaded. Concern was also noted about the fear of being paired with a “bad” teacher and developing bad habits (Ducharme, 1994).

The variety and diversity of teacher preparation programs in the state of Georgia were noted by Laurie Hart (1995) of the University of Georgia. She related that some of the programs were designed to prepare generalists, who receive equal preparation in all of the subjects, while other programs were designed to prepare teachers who specialize in two content areas. Another area where programs differed was in the methods courses. Some schools did not provide specific methods courses for just the middle school candidates. She suggested that a barrier to change in the improvement of teacher preparation programs is disagreement about these aspects.

Most stakeholders in teacher education agree that middle level teachers must understand the curriculum before they can teach it, but this agreement does not necessarily lead to consensus about what content courses prospective teachers need, how many content areas they should be prepared to teach and what depth of knowledge is needed (Hart, 1995, p.39).

Hart stated that there is another barrier to solid teacher preparation programs and that is the lack of involvement by the liberal arts faculty. The interchange between these departments in many colleges and universities is nonexistent.

Authenticity is the key component to the semester long course taught at University of Wisconsin at Platteville. Alison Brooke Bunte and William C. McBeth (1999, p. 5-8) organized a course as a simulation of a school committee’s proposal and presentation to the school board in defense of a plan to convert a hypothetical junior high into a middle school. Students had the semester to research and defend the philosophy, structures, and implementation ideas for this transition. The authors explained that “[the

students] are able to verbalize the transition from disequilibrium at the beginning of the project to equilibrium as a result of practice and the actual meeting. These two events appear to bring the concepts together for them” (Bunte & McBeth, 1999, p. 7).

The University of Vermont focuses on the learner in their middle level teacher education program. “[W]e have come to believe that much of what we consider best practice for educating middle level students should be considered best practice for educating middle level teachers. It is through modeling that we teach most effectively” (Bishop, 2003, p.2).

Highlights from fourteen college or university successful programs were described in *Profiles of Successful Programs: the Professional Preparation of Middle Level Teachers* (McEwin, C.K. & Dickinson, T.S., 1995). There are now many successful programs to serve as models on which new programs can build.

John H. Lounsbury

Biographical Information

John Lounsbury was born January 1st 1924 in Brooklyn, New York. He had an older brother and sister and grew up in Plainfield, New Jersey. In 1941 he entered Tusculum College and there met Elizabeth Carden who he later married. After a second year in college as part of the Army Specialization Training Program, he was placed in the United States Army Signal Corps and in 1945 was shipped to Hawaii. Later, because of the GI Bill, he was able to complete college at Stetson University majoring in education where he student taught at Deland Junior High School. Again using the GI Bill he completed his masters degree at George Peabody College for Teachers. In 1948 he taught social studies at New Hanover High School, Wilmington, North Carolina. He

found it frustrating to teach high schoolers and visited in junior highs as often as he could, preferring the eagerness and vitality of the younger student (Lounsbury, May 24, 2005, interview p.21-22).

In 1954, Lounsbury completed his dissertation entitled, “The Role and Status of the Junior High School” (Lounsbury, 1954). In this work he studied the opinions of Junior high School Principals as well educational leaders who were members of ASCD and were not directly employed in junior high schools. By studying the opinions of the two groups, Lounsbury, concluded that in the 1950s there was a greater understanding that the purpose of the junior high was to provide the best possible program for young adolescents. He was able to rule out earlier historic reasons for the junior high such as economy of time conceived by colleges in the 1880’s or the answer to the critical high school drop-out rate of the early 1900s. In the book he co-authored with Van Til & Vars (1961) the authors use Lounsbury’s dissertation to note that “the division into school units is mainly an administrative concern. It is not an indication of distinctive roles” (p. 40).

From 1954-1956 Lounsbury taught at Berry College, Mount Berry, Georgia and became Chairman of the Division of Education. Lounsbury advocated for better teacher preparation through the use of group work in his first published article found in *Progressive Education* (Lounsbury, 1956). Teacher education classes must employ the sound techniques of group work because “teachers tend to teach as they are taught” (p.18). If democratic classroom teachers are to be developed in schools of education, then teacher education must provide democratic experiences for them to emulate. This was the theme of his writing in this article.

After having taught at University of Florida Gainesville for a short period, Lounsbury went to the Women's College of Georgia (now Georgia College and State University) in 1960 where he remained through the rest of his teaching career. Here he continued to advocate for the democratic, relevant teaching of young adolescents. He was hopeful that the junior high would be the effective place for this to happen. Lounsbury, while writing for ASCD (1960a), was working on the history of the junior high when he wrote an article claiming that "[t]he junior high school may not have all that many hoped it would . . . yet it has achieved marked success in its relatively brief history. . . . The junior high school story is then an unfinished one; but its success to date augurs well for the future" (p.198). Writing about the junior high reformation, Lounsbury (1960b) concluded, "The fabulous future is already calling for some rather revolutionary new proposals of curriculum organization, content selection, and teacher utilization. From several quarters in recent years has come the call for a 'breakthrough' in secondary education. The junior high school may again be the school that is most ready, willing, and able to do some creative experimentation in education" (p. 150).

In the early 1960's the ASCD formed a commission on Secondary Curriculum. On May 3, 1962, the association undertook a "shadow study" 102 eighth graders in 98 schools in 26 states. Lounsbury was a participant in this study as well as one of the authors of the study's report, *The Junior High School We Saw: One Day in the Eighth Grade* (1964). After major analysis the authors concluded that a general need for improved relations between teachers and students was necessary, and a more motivating curriculum. Lounsbury used the words middle school in this document in quotes referring to the grades in the middle of elementary and high school on page 60 of this

document, however, this was not meant to be the new name for the movement at this time. Another shadow study was conducted on Wednesday March 11, 1987, this time for NASSP and Lounsbury was again one of the authors (Lounsbury & Johnston, 1988). In all Lounsbury was involved in the reporting of five national shadow studies (Lounsbury & Clark, 1990). William Alexander coined the term “middle school” in his 1960 speech at Cornell, however, both terms, junior highs and middle school, continued to be used for some time. Lounsbury wrote several more articles discussing junior high issues and using the term junior high up until 1967. For example he wrote, *Modern Education for the Junior High School Years*, Second Ed. (1967); “A Decade of Changes in Junior High Practices” *The Clearing House* (1966, April); “Recent Trends in Junior High School Practices: 1954-1964” *NASSP Bulletin* (1965, September).

In 1971, Lounsbury noted many similarities with the two reform movements, junior high and middle school and remarked, “[o]nly the passage of time will reveal how much further the middle school will retrace the junior high cycle” (1971, p. 15) and concluded his essay by stating, “Perhaps it is necessary to tear down the junior high school in order to bring about an intermediate institution more closely attuned to the times and to the young people it serves. . . . Let us not make the same mistake with the middle school. Let us, rather, set modest, realistic goals, evaluate our work carefully, and be frank in reporting both successes and failures” (p.19).

The National Middle School Association was formed in 1973 and Lounsbury became the editor for the *Middle School Journal* in 1976. He wrote for the journal as well as many other publications (see Appendix J). In one such publication, he bridged the gap between the educational program and the community’s contributions to it. He

stated, “The nature of today’s society, progressive but problem-plagued, demands that schools are academically sound and solid, yet fully relevant to the world that exists. . . . And schools cannot be what they should be without the proactive support of the community and its citizens” (1987a. p.4). Besides the theme of schools and community, Lounsbury also advocated for integrated curriculum, when he stated, “I believe that the next big push in middle-level education will be that effort 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” (Manning, 1997, p. 8). Lounsbury addressed the call to restructure the middle level in “The challenge of Restructuring Middle Level Education” which was adapted from an address he gave at Indiana State University (Lounsbury, 1993). In this article, he noted some of the good news about middle level education. It is interesting to note that in this article, Lounsbury switched back and forth between referring to this level of schooling as middle level and middle school. In this article, Lounsbury pointed to research suggesting the success of middle level schools, noting that, “the scores of 48 schools that had used a middle school approach for three years were compared with the scores of 48 schools that did not employ the approach and did not intend to do so. Students in middle schools outscored their peers in junior high schools by an average of 58 points” (p. 136). He ended this article with a stirring challenge to be about the business of “thinking deeply, caring conscientiously, and acting boldly. The pressing needs of our society, the obvious merit of the middle school concept, and your status as professional educators call for nothing less” (p. 136).

As the first dean of the Georgia College and State University School of Education, Lounsbury of course had much to say about teacher education and state certification and licensure. He was concerned with both pedagogy and dispositions of the middle school teacher and stated,

middle level teacher education must deal with the personal development of prospective teachers, as well as with acquiring credits in pedagogy or content. [Teacher preparation programs must] include helping the young teacher understand the role of an advisor, how to individualize instruction, how to work collaboratively with other teachers, and how to relate to and understand young adolescents (Manning, 1997, p.8).

Effective middle school education was more than a grade configuration to Lounsbury, but also a way of caring for the student and making sure they became well prepared adults to live in a democracy.

The Oak Hill Middle School in the Baldwin County Public School System was the site for the chance to create a laboratory school to research all of the tenets of the middle school philosophy and the *Turning Points* (1989) ideals. Lounsbury described the organization and planning which went into building Oak Hill in his article, “Building for the Future Not the Past: The Oak Hill Story” (Lounsbury & Payne, 2002). Lounsbury describes what he, in an advisory position, along with architect and school district task force decided in the way of building design as well as school program. He concluded, “While the benefits of the change are still being realized, there is in place a sound plan that is meeting the known needs of young adolescents, is supported by research, counters regrettable societal conditions, and promises much” (p. 169).

John Lounsbury continues to write, edit, speak and advocate for the developmentally appropriate education of the young adolescent. He has remained in Milledgeville, Georgia where he now lives with his wife “Libby” and is often visited by

his daughter and grandchildren. As Professor Emeritus at the “John Lounsbury School of Education” dedicated September 28, 1997 at Georgia College and State University, he has office space where he continues as Publications Editor for the National Middle School Association. As editor he has aided many young writers and middle school advocates to find their own voice to continue the legacy which he has begun.

Conclusion

The National Middle School Association (NMSA) is a professional organization founded in 1973. This association of individuals dedicated exclusively to the education, development and growth of young adolescents, has approved a position paper entitled *This We Believe* (NMSA, 1995), which was written by a committee of its members. As editor for the National Middle School Association, John Lounsbury has been instrumental in the publication of many of the monographs which reflect the organization’s beliefs. As chair of the School of Education at Georgia College, he has been instrumental in the design of that teacher preparation program as well as influential in the call for improved national middle level teacher preparation. The literature reflects the national discussions about middle level education including related historical events and one could conclude that the middle level movement was significantly shaped by John Lounsbury’s leadership, his personal work ethic and drive, and his educational achievements and writings.

CHAPTER THREE

Research Methodology

Introduction

The purpose of this dissertation was to record the events and to understand the middle level movement through the eyes of one of its founders, John Lounsbury. This study of the middle level movement from the perspective of John Lounsbury focused on his rise to leadership in the movement and established an historical perspective from which to describe the middle level movement. This study accomplished two goals. The first goal of this research was historical in nature in that events and details of the creation of the middle school were recorded and analyzed by Lounsbury, through a series of in-depth interviews. The second goal of this research was to analyze the transcripts of these interviews with Lounsbury and other documents to determine the meanings that he assigned to his experiences. John Creswell, noted author and qualitative researcher (2003), suggested that as individuals “seek understanding of the world in which they live and work, they develop subjective meanings of their experiences” (p. 8). This sociological approach relies on the subject’s participation in the analysis and interpretation of the experiences. The very nature of oral history, life history, reminiscence and life review is their focus on the interviewee being an active participant in the research process (Bornat, 2004). This participatory nature is one of the strengths, for it looks at historical phenomena through the eyes of one of its participants. Irving Seidman (1998), qualitative researcher at the University of Massachusetts, affirmed this

notion, “If the researcher’s goal . . . is to understand the meaning people involved in education make of their experience, then interviewing provides a necessary, if not always completely sufficient, avenue of inquiry” (p.4). The determination of how Lounsbury interpreted his experiences and how they relate to the middle level movement was accomplished through participation of interviewer and interviewee alike. As Valerie Yow (1994), respected author and authority of oral history design, reminded us,

In biography, the time is long past when the writer could just recount the deeds of [a] dead person, extolling the accomplishments of the public life. Now readers want to understand the way the individual [saw] himself or herself, the inner struggles and motivation, the way psychological makeup influenced the subject’s interpersonal relationships, the interpretation the subject gave to life’s events (p. 167).

Using the direct evaluation of the past through a triangulated study of documents authored by Lounsbury, through interviews with Lounsbury and other texts written about him and also interviews of those who knew him, this author answered the following questions based on Lounsbury’s perspective:

- 1) What led Lounsbury and others to develop and promote the middle school philosophy?
- 2) What factors present in the 1950’s and 1960’s necessitated reform for the education of young adolescents?
- 3) What are essential elements for successful education of the middle level student?
- 4) What is the future of middle level education?

Why This Study is Suited to a Qualitative Design

Qualitative research design is only appropriate when it is the best design to find the answers to the research questions. In the case of this dissertation, a qualitative design of oral history interpretation was the best and only design that allowed for the subject to

be part of the research. The interview, the primary methodology of oral history, also provided a platform for Lounsbury's reflection upon and interpretation of events surrounding the middle level reform movement. The testimony of this participant was necessary to discover the motivation(s) behind the recorded facts found in historical documentation. Yow (1994) stated it this way, "In oral history questioning with individuals, the "closed door" of the written record gives way to the "open door" of the interview" (p.10). An oral history will not only give us the facts of the formative years of the middle level movement which might be researched in journals and life documents, but it will also allow us to understand the inner struggles, interpersonal relationships and the interpretation that Lounsbury gives to these events (p.167). Catherine Marshall suggested "life history is a deliberate attempt to define the growth of a person in a cultural milieu" (1995, p.89). In this case, the cultural milieu was the existing state of young adolescent education in the 1950's and 1960's that prompted the development of the middle level philosophy, for which Lounsbury advocated.

Methodology

Background to Oral History

In seeking to define the research methodology from the view of several different disciplines, oral historians have used many different terms to describe what they do.

Bornat (2004) suggested that this multi-discipline status

has resulted in a proliferation of terms, schools and groupings often used interchangeably, some with a disciplinary base, others attempting to carve out new territory between disciplines. Labels such as oral history, biography, life story, life history, narrative analysis, reminiscence and life review jostle and compete for attention. What is common to all is a focus on the recording and interpretation by some means or other, of the life experience of individuals. Though there are shared concerns and to an

extent, shared literatures, there are differences, in approach and in methods of data collection and analysis (2004. p.35).

Donald Ritchie (1995), Associate Historian, United States Senate Office, teacher in the Cornell Washington Program and past president of the Oral History Association, stated that “simply put, oral history collects spoken memories and personal commentaries of historical significance through recorded interviews” (p.1). Valerie Yow (1994), used terms such as “in-depth interview, recorded memoir, life history, the recorded narrative, taped memories, life review” interchangeably with the term oral history; however, she suggested an added meaning which “impl[ies] that there is someone else involved who inspires the narrator to begin the act of remembering, jogs memory, and records and presents the narrator’s words” (p. 4). Both Ritchie (1995) and Yow (1994) reminded their readers that people have been doing oral history since the Peloponnesian Wars; however, only recently has it been accepted as a valid form of qualitative research. Researchers use various terms such as reminiscence, life review, oral history, biography, memoir, testament, recorded narrative, memoir all with similar meanings, but with each researcher setting his own distinction on those meanings. This use of multiple terms may be why researchers have difficulty agreeing about the validity of oral history as a research methodology.

For the purpose of this study, the term oral history was used. Both an historical research theoretical perspective and a social constructivist perspective were used. Historical research perspective refers to the need for triangulation or corroboration to verify facts, time frames, and experiences by more than one observer. This perspective is more interested in obtaining the closest view of what is true. The social constructivist perspective suggests that history is only in the mind of the one who experienced it, and

that it is only through that person's interpretation or construction of his/her experiences that we can know history. The nature of this researcher's purpose required an interviewing approach from both frames of reference.

Modifications to Oral History Methods

As already noted, there are many terms used in the interviewing process to name what the researcher is doing. There are as many theoretical frameworks and modifications to these frameworks as there are titles. In this study, both inductive and deductive epistemological notions were used. In the sociological analysis of this work, patterns and associations derived from observations of the subject's actions, body language, and word choices during interviews were observed. Interpretations and themes were framed about the statements heard simultaneously in the process of questioning and in the process of analyzing transcriptions as well as other documents. Theory or interpretations cannot be established a priori because they are based on the participant's perceptions and experiences (Creswell, 2003, p. 162). As a result, the formation of themes, theories and perceptions in this study were constructed during and after the interviews were conducted and are described in chapter four.

There are many uses of the interview technique, which are not related to oral history, and many manuals and fieldwork guides have appeared with many distinctive requirements to explain the new field of oral history. Donald Ritchie (1995), wrote an explanation of the methods of oral history. The methodological form for this dissertation came from his example. However, due to the nature of dissertation writing, reliance also came from experts in interpretation that followed the stricter interpretation guidelines of Oral History. Here Norman Denzin and Ken Plummer were the model for particular

methods concerning reliability, validity, analysis and matters concerning bias which are discussed below.

Role of the Researcher

The role of the researcher in oral history research is one of much debate (Ritchie, 1995). Some would suggest that the role of interviewer is strictly that of neutral questioner. This researcher followed the suggestions of Ritchie (1995) who proposed that the role of interviewer in oral history is much more than that of neutral questioner. Some analysis is taking place simultaneously as the interview proceeds and this analysis contributes to the direction and structure of subsequent questions. The researcher makes “causal links” (Creswell, 1994, p. 157) from what is said in the interview and statements about the interviewee demonstrate that the researcher is not a neutral observer. Particularly in the un-standardized interview and the semi-standardized interview, the interviewer becomes a participant with the interviewee as they build on each other’s comments and questions. Ritchie (1995) suggested that the role of the interviewer is not an equal partner however, “in the sense that the ultimate value of an oral history lies in the substance of the interviewee’s story. Nor does the interpretation of the interview rest exclusively on the interviewer’s side of the microphone, for interviewees are constantly interpreting and analyzing their own motives and actions as they recall and describe them” (p. 9).

The potential for researcher bias and its affect on the validity of oral history is a concern. However, there is less chance that such bias will intrude when the researcher is both aware of the problem and its sources. Plummer (1983, p. 102), suggested such bias comes from three possible directions: the researcher, the subject and the interaction

between the two. However, “to purge research of all these sources of bias is to purge research of human life. It presumes a real truth may be obtained once all these biases have been removed” (p. 103). This researcher attempted to identify the possible biases and thus identify how these sources might color the outcome of this study rather than attempt to ignore or eliminate these biases. Having studied the middle school philosophy and young adolescent development for over 20 years, this study had great significance for this researcher, and thus a personal affinity or bias might be present. Rather than attempt to eliminate this affinity, previous study and experience served to enhance the examination of the significant issues involved, however, personal convictions and beliefs concerning young adolescent education have been critically examined in order to allow for maximum objectivity concerning the nature of this research.

Although a good rapport between interviewer and interviewee is of utmost importance to a successful oral history, the relationship that develops between interviewer and interviewee may also become an area of potential bias. A researcher may feel drawn toward the narrator or resistant to what he or she is saying (Yow, 1994). Vigilance was taken to guard against misrepresentation or omission in the analysis and questioning based on any personal feelings or regard which may have developed.

Age and memory are both concerns of which the oral historian must be aware. Although Lounsbury, is 82 years old, he is still highly regarded in his field as an editor of books, monographs, statement papers and manuscripts for the National Middle School Association and many in the field still seek his advice and council (Mary Mitchell, 2005). Areas of special interest often enhance memory and life study (Yow, 1994). Ritchie (1995) noted that “people remember best what was most exciting and important to them,

their most vivid memories are often of the earliest days of their careers, when events were fresh and invigorating, even if their status at the time was relatively insignificant” (p. 12). This is significant, as the earlier days in Lounsbury’s career are the most pertinent to the development of the middle level movement.

The Role of Baylor University Institute of Oral History

Recording equipment and tapes for both face to face interviews as well as phone interviews was provided by Baylor University Institute of Oral History. Because of a faculty fellowship from the institute, transportation costs to Milledgeville, GA to spend three days with Lounsbury in the spring of 2005 were covered. The interview transcriptions were provided by the institute and the faculty fellowship as well. The interviewees signed a deed of gift contract granting the Baylor University Institute of Oral History copyright of these transcriptions and the transcriptions and tapes are now archived in the Texas Collection, Baylor University Carroll Science Library. Therefore, all interviews conducted by this researcher are cited as part of the Oral History Department Archive. These transcriptions will be sealed until 2011 and then be made available to the public for further study. At that time, copies of these transcriptions will be made available to the National Middle School Association Archive, housed at the Bailey Howe Library, University of Vermont.

The archival of these interviews is paramount to the recording of the history of the middle level movement. Much communication, personal planning and what would have been paper documents in the past are now lost to historical study due to the quick delete feature of email and to the use of aural communication via phone and other means of electronic communication. Thus, while the key players are alive, it is paramount that

their voices and their spoken thought be collected and maintained in this manner for further historical study. Although one can find many of Dr. Lounsbury's philosophical beliefs and personal views recorded in his many writings, and in topical short interviews, one will only find reflections in his own voice about his writings and the events of his life as they pertain to the development of the middle level movement in these two archival collections. Appalachian State University has begun a Legacy Project under the direction of Ken McEwin and Tracie Smith (McEwin, 2006), a project to video-tape interviews of key founders in the middle school movement, that project is not as exhaustive on any one key player. Therefore, this dissertation is extremely important to record the oral memoir of John Lounsbury and his views of the middle level movement.

Procedures

Initial Lounsbury Interviews

A series of semi-structured, in-depth interviews were conducted by the researcher with John Lounsbury in his office at Georgia College and State University (GCSU) in Milledgeville, Georgia. The first series of interviews took place over a three-day period, with a maximum 90-minute session two times per day, reserved for taped interview. The first day's question guide (Appendix D) focused on Lounsbury's personal life experiences, the second day's question guide (Appendix E) focused on his work in the late 50s through the early 70s and the beginnings of the middle level movement. The third day's question guide (Appendix E) focused on more recent developments in the middle level movement and Lounsbury's continued involvement through his position as editor for the National Middle School Association and advisor for the Georgia Lighthouse Schools. During the initial three days in Georgia, two additional taped

interviews were conducted, one with Lounsbury's wife, Elizabeth Lounsbury, and one with his assistant of twenty years, Mary Mitchell. There were also many informal times of interview and conversation with the three participants, where taping was not done. Lounsbury provided a personal tour of the campus and introductions of key faculty and administrators of GCSU. Informally in his office, Lounsbury discussed photographs, scrapbooks, award plaques and letters from associates. The working atmosphere of the NMSA editorial publications office was also observed as Lounsbury attended to business between taped interviews. Also, one evening Lounsbury hosted this researcher and her husband to dinner and a tour of Milledgeville. Lounsbury talked about the years in which he resided there as well as his personal religious beliefs, his hobbies, books read, travels and personal interests.

Other Interviews

Following three days of interviews with Lounsbury, his wife, and his assistant, the Baylor Oral History Institute made transcriptions of the taped interviews which were reviewed and corrections were made by a senior transcriber. The transcriptions were then read by the interviewer and after corrections were made the interviewees read and approved the transcriptions. Through the literature review and suggestions made by Lounsbury and his assistant, the following initial list of interviewees were sent the request letter (Appendix A), deed of gift (Appendix C) and additional interview information sheet (Appendix C) via email:

- Bruce Bailey, Attorney for NMSA, has worked with Lounsbury, Board of NMSA foundation
- James Beane, early Middle school leader, Lounsbury Award winner in 1997, author

- Sherrel Bergman, author, professor and 1999 winner of the John Lounsbury Award;
- Ed Brazee, professor, and current publications editor for NMSA;
- Ross Burkhardt, consultant, co-authored *This We Believe: Developmentally Responsive Middle Level Schools*, the National Middle School Association's fundamental position paper, President of NMSA in 1996-97, and in 1998 he was inducted into the National Teachers Hall of Fame;
- Donald Clark, early NMSA leader, author, and researcher
- Nancy Doda, Nancy Doda is an author, professor, and Lounsbury Award winner in 2001
- Cecil Floyd, Texas Middle School Association, Executive Director
- Tom Gatewood, president of NMSA in 1975-1976, first editor of the *Middle School Journal*, professor, retired;
- Paul George, has been called one of middle level “founding fathers”, Lounsbury Award winner in 1998
- Jim Gill, Middle level principal and author
- Linda Hopping, NMSA foundation board member with Lounsbury
- Lee Manning, Professor and Eminent Scholar at Old Dominion University, he has written approximately 200 articles and 22 books, some in their 3rd and 4th editions.
- Ken McEwin, author, professor, president of the NMSA in 1982-1983, the author of over 125 publications on middle school education and a recipient of NMSA Distinguished Service Award; Lounsbury Award winner 1989
- Nancy Mizelle, author, professor at the John Lounsbury School of Education and long-time colleague of Lounsbury, Research in Middle Level Education SIG ;
- Marion Payne, Partnership consultant, president of NMSA 1998-1999, principal, State Department of Education Middle School Specialist, former Director Oak Hill Middle School Complex, Milledgeville, Georgia;
- Jerry Rottier, author through NMSA publishing, Lounsbury edited

- David Puckett, middle school teacher and author, Kentucky Middle School Association's Teaming Award, regional director of the association;
- Tom Rogers, retired professor Cornell, life-long friend of Lounsbury;
- Fran Salyers, Center for Middle School Academic Achievement, NMSA president 1999-2000, Kentucky Middle School Association;
- Mark Springer, author of *Alpha* and *Soundings* integrated curriculum, and others;
- John Swaim, NMSA president in 1979-1980, professor author, and co-founder of the Colorado Association of Middle Level Educators; 1995 winner of the Lounsbury Award
- Conrad Toepfer, author, professor, NMSA president 1987-1988, know as one of the founders of the middle school philosophy; 1985 winner of the Lounsbury Award
- Gordon Vars, executive secretary for the National Association for Core Curriculum, co-author with Lounsbury in Junior High Reform articles and books, co-authored *This We Believe: Developmentally Responsive Middle Level Schools*, NMSA's fundamental position paper, first president of NMSA in 1971-1972, winner of the Lounsbury Award in 1987.
- William Van Til, graduate mentor of Lounsbury (died prior to contact, January 2006)

After an affirmative response via email or no response at all the responders were sent a paper copy of the deed of gift, the cover letter, and the additional information papers along with a return postage paid envelope. Those who returned signed forms were then contacted by phone for an interview. The thirteen respondents were asked the questions listed in the phone interview guide (Appendix J) during the subsequent phone interview. Each of the five earliest interviewees were asked for the names of others whose testimony would be beneficial to the research. There were no new names added to the list by this means, however, there were some who an additional follow up email or letter were sent in order to encourage participation. From the list above, only Bruce

Bailey, Donald Clark, Paul George, Jim Gill, Linda Hopping, Lee Manning, and Jerry Rottier never responded to either email or letter. James Beane and Cecil Floyd were the only individuals who returned the deed of gift and were not interviewed. Beane never responded to the request for a time to be interviewed and also signed the deed of gift with many restrictions for the copyright of interview. and so he was not included in the interview. Cecil Floyd, although willing, was never available at a compatible time for interview. William Van Til passed away before contact could be made. From May through September 2006 phone interviews were conducted with the interviewees. Transcriptions of all tapes were prepared by the Baylor Institute of Oral History.

Follow-up interview with Lounsbury

After reading and reflecting over the 2005 transcriptions with Lounsbury, and five of the initial phone interviews were completed, a return visit to Milledgeville was made in July of 2006. Three taped sessions were made at that time with Lounsbury, as well as a taped interview with his colleague Nancy Mizzelle. Informal interviews took place at the Lounsbury home over lunch with John and Elizabeth Lounsbury as well as Mary Mitchell. During the July 2006 visit, informal discussion took place with present Dean of the School of Education at GCSU, Linda Irwin-DeVitis, as well as anyone in the building that Lounsbury met and talked with in the halls of the building. One informal discussion with Lounsbury over dinner also took place, with just the researcher and Lounsbury present. Many short email contacts have also taken place as communications over arrangements for the trips, as well as over the information of Van Til's death.

The Baylor Institute for Oral History's guidelines (Appendix H) as well as the American Historical Association's recommendations (Appendix I) for recording Oral

History were followed during the interview process to provide for ethical conduct as well as protocol. Also, the interviewer and interviewee had an agreement that anything said off tape would be considered as background and not used in direct quotation. The interviewee had the right to listen to all taped interviews and read all transcriptions of the interviews prior to final release. Lounsbury read transcriptions of his interviews and recorded changes of grammar or sentence clarity but no content changes.

In 1990, the Oral History Association issued recommendations (noted on the Baylor University Institute for Oral History website, retrieved November 18, 2004) about interviewing for Historical research. The following recommendations were implemented to adhere to the professional responsibilities:

1. Interviews will be recorded on tape after the person to be interviewed has been informed of the mutual rights and responsibilities involved in oral history, such as editing, confidentiality, disposition, and dissemination of all forms of the record. Legal releases and agreements between the interviewer and interviewee will be documented.
2. The interviewer should strive to prompt informative dialogue through challenging and perceptive inquiry, should be grounded in the background and experiences of the person being interviewed, and, if possible, should review the sources relating to the interviewee before conducting the interview.
3. To the extent practical, interviewers should extend the inquiry beyond their immediate needs to make each interview as complete as possible for the benefit of others.
4. The interviewer should guard against possible social injury to or exploitation of interviewees and should conduct interviews with respect for human dignity.
5. Interviewers should be responsible for proper citation of oral history sources in creative works, including permanent location.
6. Interviewers should arrange to deposit their interviews in an archival repository that is capable of both preserving the interviews and making them available for general research. Additionally, the interviewer should work with the repository in determining the necessary legal arrangements.

The Baylor University Institute for Oral History is the archival repository for said tape recordings and transcriptions. The Institute will seal these tapes and transcriptions for five years following the interviews. This is standard contractual agreement for faculty fellows in the Baylor University Institute of Oral History of which this researcher is one.

Data Analysis

Interpretation of the data collected through interviewing Dr. Lounsbury proceeded simultaneously with the collection of the data. The very nature of oral history requires the interviewer to interpret what the interviewee is saying, his motives and body language, in order to ask the next question. The interviewer created questions and interpretations as the interview proceeded. Then as the interviewer analyzed the data, more questions arose, and suppositions were created and dismissed sometimes within the span of one question and answer.

There is much discussion in the literature concerning analysis of the data in an oral history. The Oral History Association regards the taped interviews and transcriptions of the interview to be the oral history, however, omissions and interpretations of these taped interviews must be taken into consideration in a written analysis of the oral history. There is little agreement in the field of oral history as to one correct method of data analysis.

Reading the transcripts over and over, making notes, bracketing key words or phrases and seeking patterns between the words of interviewees were the first steps of analysis. Then an interpreted understanding of the meaning that the interviewee gave to his actions at the time of the event will be developed. Thirdly, these events were interpreted in light of the overall context of the current life (Rosenthal, 2004). In order to

accomplish this analysis, Plummer suggested that this work “entails brooding and reflecting over long periods of time until it ‘makes sense’ and ‘feels right’ and key ideas and themes flow from it” (1983, p. 99). This “constant comparative” form of analysis as suggested by Cresswell, (1998, p. 151) was applied to the transcriptions, whereby the researcher interviewed until categories were well developed and then subcategories were labeled from the multiple perspectives found in each category.

The first transcriptions were made a full year prior to the final analysis. Within the oral history tradition, the raw data (transcriptions or taped interview) was analyzed by reading and rereading the whole transcript and then “conceptually scaffolding” (Ritchie, J. 2003, p. 217) the emergent ideas and themes within the context of the whole life as narrated and described in the interview. The uniqueness of this process and the “value of [this approach] lies in the opportunity it provides to take the whole life . . .and [the] historical context into consideration when analyzing the data” (Bornat, 2004, p. 41). This data reduction and interpretation into specific themes was based on the nature of the research questions.

Initially, the researcher made use of Plummer’s direction who stated, “the standard technique is to read [the transcripts] and make notes, leave and ponder, re-read without notes, make new notes, match notes up, ponder, re-read and so on . . . This constant comparative technique is somewhat like a weaver who works with individual strands of varying colored wool and although keeping the one strand in hand immerses with the entire tapestry in the end” (1983, p. 99).

During this time of analysis, Grounded Theory was applied. The researcher began with first reading the transcriptions as soon as they were completed without coding

in anyway. The earliest transcripts were then set aside for nearly 10 months while the interviewer mentally processed the overall direction of the first set of interviews at times rereading certain sections, again without coding. Then a second complete reading took place with the researcher using different colored highlighters to code material pertinent to the four research questions. A yellow highlighter was used for the coding of general biographical information, an orange highlighter was used to mark material which answered the first question “What led Lounsbury and others to develop and promote the middle school philosophy?”, a green highlighter was used to mark the material which answered the second question, “What factors present in the 1950’s and 1960’s necessitated reform for the education of young adolescents?”, a blue highlighter was used to highlight material relevant to question number three, “What are essential elements for successful education of the middle level student?”, and a pink highlighter was used to mark material relating to the fourth question, “What is the future of the middle school as he sees it?”. After having marked the material in this manner, the researcher reread all of the transcripts and coded the answers by noting key themes which appeared under each question. A spreadsheet (Appendix J) was then created to organize the responses to each of the research questions. As the third reading of the 2005 Lounsbury transcripts was undertaken, broad topic titles were added to the spreadsheet as answers to each of the various research questions emerged. Then the transcripts taken from interviews with Lounsbury’s colleagues were treated in the same manner, adding broad topic titles where necessary. The researcher made a separate notation if material disagreed with Lounsbury in any way. Another reading of the Lounsbury 2005 transcripts was then necessary in order to notate passages where Lounsbury had eluded to these additional broad topics

added from statements made by Lounsbury's colleagues. The spreadsheet was then analyzed to determine the number of times to which Lounsbury and the other leaders mentioned the broad topic. If a topic had only been mentioned once or twice, then that it was not considered pertinent to the outcome of the research question and not entered into the discussion of the research questions. The spreadsheet was then used to organize and then reorder categories into over-arching themes which would answer the research questions. These categories and themes are discussed in chapter four.

Triangulation of the data (Creswell, 1998, p. 202) occurred between and after the data collection. This enhanced the internal validity of the issues although as noted by Donald Ritchie (1985) "no single piece of data of any sort should be trusted completely" (p. 6). Continuity between documents, interviews and corroboration with other participants was sought. The use of follow-up telephone interviews, and email questioning to augment and test reliability of information and stories was done where necessary. As participants in the research, the interviewees were asked to review and comment upon interpretations and help to make meaning from the experiences. A time line was used to plot themes and life episodes to determine the thematic nature within the historical perspective.

The Product

In all actuality there are two products which came from this research. The first was the taped interviews and their transcripts, which are housed in Baylor Institute for Oral History and the Middle Level Archive, University of Vermont. Many oral historians suggest that the tapes and transcriptions are the only true product of an oral history project. For the sake of this dissertation, however, a narrative was also produced. This

narrative weaves data, analysis and interpretation together. Plummer suggested (1983), “It is to the tools of the novelist, the poet and the artist that the social scientist should perhaps turn in the qualitative humanistic tradition” (p. 106). This dissertation has analyzed all of the data found in the transcriptions of the Oral history and answered the research questions.

CHAPTER FOUR

Findings

Organization of Chapter Four

This chapter will review the coding procedures, report the events of John Lounsbury's life with emphasis on his role in the middle school movement as told to the researcher, and summarize responses to the research questions.

Coding Procedures

Interviews for this project began in Milledgeville, Georgia in May of 2005. John Lounsbury was interviewed while sitting in his office which is located within the John Lounsbury School of Education at Georgia College and State University. Follow up interviews with Dr. Lounsbury were then made in July of 2006, however, moved to an empty conference room in the School of Education to gain a better recording. Appendix D lists the initial questions for the 2005 first day interview, which were of a personal nature about his childhood and early education. Appendix E lists the initial questions for the second day interview which concerned the early days of his career and the days of the middle school movement. Appendix F lists initial questions for day three interview and concerned Lounsbury's later days in the movement and his job as publications editor for the National Middle School Association. Most of these questions were fairly broad and were meant to bring up particular topics to which Lounsbury would respond. As he mentioned particular events or topics, follow-up questions which were not prewritten, were asked spontaneously. Most of the biographical data was collected from the first day

interview with Lounsbury in his office on May 23, 2006. Phone interview questions for colleagues and other leaders in the middle school movement are listed in Appendix G. These phone interviews were completed during the second year of data collection. Appendix I contains the list of other interviewees and brief statements of their accomplishments and associations with the middle school movement. The list of questions for the follow up interview with Lounsbury on July 5, 2006 are included in Appendix K and interview questions for July 6, 2006 are included in Appendix L. During these 2006 interviews many of the questions about the early days of the middle school movement were repeated for comparison purposes. At this time the actual research questions were also asked just as they had been asked of the phone interviewees again for verification and triangulation.

In order to analyze this great volume of data, Grounded Theory was applied. The researcher read and re-read the data and a system of coding responses was developed. A spreadsheet (see Appendix J) was then created to organize responses to each of the research questions. The spreadsheet was then analyzed to determine the number of times to which Lounsbury and the other leaders mentioned the broad topic. If a topic had only been mentioned a very few times, then that particular themed response was not considered pertinent to the outcome of the research question and was deleted from the spreadsheet included in Appendix J for space sake. The spreadsheet was then used to organize and then reorder categories into over-arching themes which would answer the research questions and those themes are discussed here. For a complete discussion of the coding and analysis procedures see chapter three, "Data Analysis".

Findings

The Findings section of chapter four is divided into several parts. First the early life and education of Lounsbury as told to the researcher will be reported. Next, Lounsbury's career in the junior high reform effort will be reported followed by a section discussing his philosophy, teachings, writings. Lounsbury's role in the early and latter days of the middle school movement will be highlighted and then the responses to the four guiding research questions will be reported including the themes and variations which surfaced in their discussion, followed by a final summary of the findings.

Early Life and Education of John Lounsbury as Told to the Interviewer

Nineteenth century poet, Gerard Manley Hopkins, penned this line in a poem: "*The Child is father to the man*" (Bartleby, Retrieved 2006). This line suggests that the nature of childhood shapes who we become as adults. With this idea in mind, this researcher explored the early life and education of John Lounsbury asking him to reflect on situations of importance to his adult life.

John Horton Lounsbury was born January 1st, 1924 and grew up in Plainfield, New Jersey (the information for the biography section of the dissertation comes almost exclusively from interviews with John Lounsbury unless otherwise noted). Lounsbury was a child of the depression. He observed how that time in our country's history affected his father, a New York City investor, "while he didn't commit suicide as many of his friends in New York City did, he was ruined and psychologically he never got over it" (Lounsbury, May 23, 2005 interview p.2). Tom Rogers, a childhood friend, noted that it might have been the loss of financial security that caused the Lounsbury family to move into his neighborhood during the depression era and thus began their friendship

which has continued to the present day (Rogers, 2006 interview p.11). Although material possessions were much less for the Lounsbury family in the new neighborhood, and the loss was near devastating for his father, Lounsbury noted that he had a good childhood. Playing in the woods, shooting his BB gun and sledding in the winter were all favorite past times. Two early jobs that he had during his youth were peddling *Delineator* and *Liberty* magazines door to door and hand setting pins in the bowling alley at the YMCA. Lounsbury was the youngest of three siblings. His older brother and sister were “very able people” and his brother was “an aggressive leader in high school and [Lounsbury] had to follow in his footsteps” (Lounsbury, May 23, 2005 p.2; Rogers 2006, interview p. 15). In High School Lounsbury was active in track and cross-country and was a cheerleader. Lounsbury explained, “Back then, we literally led cheers and half the team was boys. We had megaphones and old-fashioned cheers” (Lounsbury, May 23, 2005, p. 4). Later he washed cars for people while they went into the city for the day at a tire retreading shop. During his senior year and the first year after graduation, Lounsbury drove a truck for the same company and delivered tires all over middle New Jersey.

Reading was a favorite and important past time for Lounsbury. He read books like *Deerslayer*, *20,000 Leagues Under the Sea* and listened to radio programs like “Buck Rogers in the 21st Century” and “Jack Armstrong—The All American Boy.”

Perhaps experiences from Lounsbury’s early schooling could be partially responsible for his concern for good teaching practices in later years. Although he did not say so, memory has a way of collecting transformational experiences and bringing them to the forefront in later years (Ritchie, 1994). Two of Lounsbury’s school memories were of particular teachers and their teaching styles. One was the industrial

arts teacher, “Mr. McCullough, [who was] the only teacher . . . whose name [he] still remember[s]” (Lounsbury, May 23, 2005, interview p. 5) “He was an ordinary man, but somehow that experience meant more to me than anything else, and I remember to this day making those copper ashtrays which we would pound out, heat and then plunge them into water and make them sizzle” (p. 6).

The second teacher that Lounsbury remembers from his early school days was his homeroom teacher. He used “math as a punishment; long division problems of six numbers divided into eight numbers which had to be carried all the way down the page” (Lounsbury, May 23, 2005, interview p. 6). This is how he learned to hate math as a seventh grader. Lounsbury stated that he had a fairly “negative kind of philosophy to begin with, and part of [his] justification or rationale for going into teaching was to do better by kids than had been done [to him]” (Lounsbury, May 24, 2005, interview p. 2).

In high school Lounsbury was active in school government and in athletics. He was elected president of the junior class. Because of failing algebra, where “Mr. Lewis . . . would literally throw the erasers at us in the back of the room, and we would try to get him to do that, and then of course the chalk dust would fly”, and having to attend summer school he wasn’t eligible to run for senior class president. In his senior year, Lounsbury took biology from Dr. Hubbard, a plain ordinary man, but dignified. One who made biology make sense. Later, Lounsbury’s interest in biology became the reason for his completing his student teaching experience in biology even though he was prepared to teach social studies. Biology was the only class where he earned an “A” in high school (Lounsbury, May 23, 2005, interview p.10).

Lounsbury noted that in high school it became evident that he was a peacemaker. Fellow students would come to him if they were having difficulties and he acted as mediator with them. Lounsbury noted that he had acted as mediator between his friend Tom Rogers and a female friend at one time. Lounsbury said of himself, “I get credit sometimes for scholarship and things that are really not that great, it’s much more that I’ve been a nice person” (Lounsbury, May 23, 2005 interview p. 8).

College seemed an impossibility for Lounsbury because of financial circumstances as well as the lack of scholarships, but due to the generosity of a relative, Lounsbury was able to attend Tusculum College in Greeneville, Tennessee. In the fall of 1941, probably on his first day of arriving, he met Elizabeth Carden, who has been his wife for sixty years. Pearl Harbor, December 7th, 1941 brought a sudden change to the planned four years of college at Tusculum as Lounsbury entered the Army Specialized Training Program which allowed him to stay in school for a second year, but then left for Army training and deployment the following year. He shipped out in 1945 to Okinawa and later was elevated to the rank of Technical Sergeant. After the war ended he returned to Ft. Oglethorpe, GA where he and Elizabeth, “Libby”, were married with Tom Rogers present as best man. The difficulty of finding married student housing took the Lounsburys to Stetson University, where he ultimately finished his degree. Although unsure of what he wanted to study, in his first semester back in school he was enrolled in a course of the History of Education where he discovered teaching as a chosen career.

Using the GI bill to pay for his education, Lounsbury finished his bachelor’s degree in teaching, completing his student teaching at DeLand Junior High School, his only visit to a public school during his entire preparatory program. Because of the GI

bill, Lounsbury was also able to attend George Peabody College for Teachers where he earned a master's degree and then was able to begin his doctoral work, also on the GI bill.

Between his master's degree and doctorate, Lounsbury took a teaching job in Wilmington, North Carolina as a high school social studies teacher. He "was a little frustrated, because at Peabody, [he] had excellent professors, who really imbued [him with the idea of] democracy and progressive education and [he] found that the high school was not set up to accommodate that" (Lounsbury, May 23, 2005, interview p. 21). Lounsbury "found high school students were a bit blasé about [education]. [He] found younger kids were much more interested, creative, imaginative and more eager about things, and so [he capitalized on] what opportunities [he] had to visit with middle level students" (p. 21).

Lounsbury's Career in the Junior High Reform Effort

While at Peabody College working on his doctorate, Lounsbury had the opportunity to study with William Van Til and many other progressive educators. In Wilmington, Lounsbury was given the assignment of converting two elementary schools into one junior high school. Lounsbury found himself needing to research more about junior high schools in order to complete this assignment. The study of junior high then became his focus while studying at Peabody. This is where he became a serious student of the needs of young adolescents and an advocate for the junior high movement. His dissertation was titled, "The Role and Status of the Junior High School" (Lounsbury, J. H., 1954). He graduated with his doctorate from George Peabody College of Teachers in 1954.

Upon his graduation from Peabody, Lounsbury took a job at Berry College and Mount Berry Schools in North Georgia. Because he was one of few doctoral professors he was made chairperson of the small department. In 1956 the Berry College yearbook was dedicated to him. He taught in this setting for just two years and then moved to teach at the University of Florida in Gainesville. After four years at the University of Florida, Lounsbury's colleague from his Berry days and then president of Georgia College persuaded him to go to Milledgeville, Georgia to the Georgia Women's College which is now Georgia College and State University.

Lounsbury's Philosophy, Teachings, and Writings

In the earliest days of his career, Lounsbury was an advocate for student centered education in the junior high student. Teaching democratically was important to him. He developed his philosophy from his study of John Dewey, William Heard Kilpatrick and William Van Til. This philosophy as Lounsbury saw it called for a

[c]ommitment to democracy, a commitment to life in all its manifestations [and] the involvement of pupils actively in it. And, in my judgment, the one way we could improve education quickest, fastest and cheapest is simply to involve kids more in helping to decide what it is you're going to study and how you go about learning it (Lounsbury, May 24, 2005, interview p. 5).

Teaching democratically was a way of life in Lounsbury's own classroom. When Lounsbury taught ninth and tenth grade social studies at New Hanover High School he described his class curriculum this way: "we would have class four days a week, but on the fifth day, Friday, I would turn class over to the students. The students organized themselves into clubs and had officers. We surveyed and tried to get participatory

democracy going, which was my attempt at fulfilling my belief that kids should be more involved” (Lounsbury, May 23, 2005, interview p. 22).

John Lounsbury became known as an advocate for young adolescents through his discussion of junior high reform. Early in his career he worked with his mentor William Van Til, and colleague Gordon Vars on a book of junior high concerns which became a classic in the study of junior high education, *Modern Education for the Junior High School Years* (Van Til, Vars, & Lounsbury, 1961). Together the three and many others continued to advocate for reform for the junior high. They believed that the junior high had moved away from its original intent.

Lounsbury's Role in the Early Middle School Movement

William Alexander was the first to use the term “Middle School” in 1963 at Cornell during a speech about the need for reform of the junior high he called for a new kind of education for young adolescents in the middle (Alexander, 1998). Although Lounsbury was not present when Alexander spoke, Gordon Vars, Lounsbury’s friend and colleague was, and he and others shared with him the nature of the speech. Due to the speech’s important message and because it impacted the future of young adolescent education in such a dramatic way it has been, discussed in the literature, reprinted (David, 1998, p. 3) and became for many the rallying cry of the middle school movement.

Lounsbury reflected about the speech in this way,

Alexander’s speech was significant because of who he was, first. He was a well-established high-regarded curriculum person with a national reputation, active in ASCD and all of that. And when he used that term in the speech—he went to make the speech at a meeting on the junior high, with Gordon Vars there at the Cornell Project, and that’s where he first used the term. And that was picked up and became the focus, and so my renaissance of the junior high school was no longer needed, because now

we had the middle school as the rallying point—as the talking point. It gave us this fresh start, because we weren't going to change the junior high, so long as it was stuck with that label, which was an unfortunate label (Lounsbury, May 24, 2005, interview p. 29).

With this speech the middle school movement was launched, and Lounsbury who had been appealing for the same type of renaissance for young adolescent education only using the name junior high school, became a natural leader in this newly named movement. Tom Gatewood, former president of NMSA, suggested that Lounsbury was an early leader in the movement, “I think John was thinking about what education should be for early adolescents . . . I think that was the true core really of what became the middle school concept and philosophy that really kicked the whole movement off back in the early 1960s” (Gatewood, 2006, interview p. 10).

The leaders in the early days of the middle level movement each had their own credentials and talents which they brought to the movement, however, many have suggested that Lounsbury was one of the voices of the movement. Ross Burkhardt stated, “[W]hat John had was an ability to write. He had an ability to take ideas and to put them forth. As this fledgling organization began, John was able to be a very, very articulate voice” (Burkhardt, 2006, interview p. 22).

The early days of the middle level movement and the formation of the National Middle School Association (NMSA) found Dr. Lounsbury working at the grass roots. He attended every NMSA conference since their inception in 1974 in Columbus, Ohio. He worked with almost every state in one way or another. He helped many states to get newspapers either started or improved. Fran Salyers, former editor of the Kentucky middle school paper, recalled [while at the NMSA Conference] “He actually took time to sit and look at our newspaper and kind of give us some pointers . . . he sat 30 minutes on

a couch with us as people were walking by speaking to him” (Salyers, 2006 interview p.2-3). Ross Burkhardt, former NMSA president and national teacher hall of fame inductee, talked of Lounsbury’s contributions to the states in this manner,

if you consider what he did in terms of publications with National Middle School Association, what he did as a spokesman, speaking as the key note speaker at conference after conference around the country, and then his own personal writing, in which he further articulated the vision. You have a kind of a Johnny Appleseed going around here, carrying the word and bringing the message to many, many people (Burkhardt, 2006, interview p. 23-24).

The energy and enthusiasm with which Lounsbury worked to further the cause of young adolescents was limitless. Mark Springer, author of *Watershed*, attested to this energy as being a major factor in the success of the movement,

Again, in his own writing, as I see it being involved in the National Middle School Association right from the very beginning. I think he’s been one of the driving forces, and his energy and his willingness to put himself out there in the forefront in publication and in speaking, and then, you know, going around the country, and then working with teachers. I think those are the attributes that have put him at the top and continue to keep him there as he continues to write, and he continues to speak and work with teachers (Springer, 2006, interview p. 22).

Lounsbury’s interest and advocacy of middle level education was evident in his presence and support of the NMSA conference each year. He attended every conference from the organization’s birth. He also advocated and encouraged others to attend and present. Ross Burkhardt, shared his experience of becoming a presenter at the conference and attributed his success to Lounsbury in this manner:

I sent several applications to do workshops, [about the things we were doing at his school in New York] and I got rejected in 1982, and I got rejected in 1983. 1983, I got a letter from a guy named John Lounsbury, who I didn’t know too well, but I had heard of him because he was some kind of author and some kind of important guy in national middle school. And his letter said something like—he had been to visit [our school]. His personal handwritten note to me said something like “Ross, the stuff I saw

in your classroom is what we need to have presented at the conference. Why don't you apply to do a presentation?" And I wrote John back a letter saying, "I applied three years in a row, and I've been rejected." And that year when I applied, I Xeroxed his note, and I clipped it to my application, and I said, "John Lounsbury says I should be presenting. And I have presented at the National Middle School every year since 1984 with the exception of the two years that I didn't go because of other commitments (Burkhardt, 2006, interview p. 9).

Lounsbury's encouragement played an important role in shaping the conference through his presence, participation and encouragement of other presenters.

Lounsbury spoke of the early NMSA conference meetings as "almost a kind of religious experience" (Lounsbury, May 25, 2005, interview p. 5). The spirit of camaraderie is still present according to Lounsbury and has continued to be one of the movement's real strengths. One of the other strengths, according to Lounsbury which has continued to the present, is the organization's singular focus.

It is not an organization for people who fill a particular position. It is not set up to be a teachers' organization, principals' organization, a counselors' organization, a teacher educators'—it is committed to the education of young adolescents, and our membership is open to anybody, including parents. . . . That's our strength, but it's also our weakness, because nobody *has* to join NMSA (Lounsbury, May 25, 2005, interview p. 5).

The national organization advocates for the needs of young adolescents both in school and in the communities. Leadership in the organization comes from all those involved, including classroom teachers.

At the second NMSA conference, 1975, in Atlanta, Georgia Tom Gatewood, then editor of the *Middle School Journal* and newly elected president of NMSA, approached John Lounsbury to become editor of the journal, "You know we're looking for someone to take over the *Middle School Journal*. Would you be interested?" And he expressed some interest, asked for a little time to think about it, and called back and said, "Yeah, I

think I'll do it." So that's the point at which he and I really stepped up our correspondence, and our communications. I passed [the editorship] on to him" (Gatewood, 2006, interview p. 4). In the first year after Lounsbury's editorship, the journal was expanded and the production type was improved upon. For the first year in Indianapolis, a linotype, used. Lounsbury formed a publications committee that read manuscripts as a review board. Through the next few years, the journal was expanded and improved significantly until it gained recognition. After the first year, Lounsbury used a printing firm in Macon, Georgia which printed using galleys. During this time, Lounsbury continued his obligations as dean of the school of education at Georgia College with both administrative duties as well as teaching his own classes. Lounsbury and Nellie Gilbert, dean's secretary, literally cut and pasted journal articles into their final layout form.

The publications committee, headed by Lounsbury, met in the Atlanta airport to discuss the submissions after having read and critiqued them. Lounsbury reported,

One of the nice things about doing this job was that it gave me the opportunity to be in touch with what was going on in middle level. I guess you'd have to say I'm probably the best-read student because I have read every [*Middle School Journal*] manuscript for years, and now all [NMSA publications] manuscripts which come in. So my finger has been on the pulse of the middle school in many ways simply by having a chance to read the articles that were submitted to the journal and then in more recent years, the various manuscripts for books and other publications" (Lounsbury, July 6, 2006, interview p. 3).

About 1990, Lounsbury and Gilbert realized that the work load was becoming too intense for them to continue and so they put an advertisement in the paper for part-time secretarial help. Mary Mitchell had just moved to town with her newly retired husband and was looking for secretarial work. Lounsbury called her and

said he was only looking for someone for about ten hours a week and that his editorship would probably be short-lived. Mitchell took the job until she could find something more permanent. She has been with Lounsbury and NMSA ever since (Mitchell, 2005, interview p. 1).

During this same time, Lounsbury's teaching and administration roles continued at Georgia College. Lounsbury loved to teach introduction to teaching courses because as he said, it "would give me an opportunity to develop positive attitudes about teaching. [P]eople in the liberal arts would not give much encouragement to a student if she or he would say she wanted to be a teacher. They were likely to get talked out of it. So, I saw this as an opportunity to build positive attitudes" (Lounsbury, July 7, 2006 interview p. 37). Lounsbury used progressive ideas in his teaching being one of the first to use a team approach to coursework and to teach using literature, "using books like Jesse Stuart's *The Thread that Runs So True*, *The King and I*, *Windows For A Crown Prince*" (p. 38).

Administration was not one of Lounsbury's favorite roles. When he was dean of the GCSU School of Education, he was required to manage personnel and in some cases even fire a faculty member. Lounsbury stated, "I did not like being an administrator. And as the college grew in size and bureaucracy and hierarchy I became less comfortable in it" (Lounsbury, July 7, 2006 interview p. 39).

Lounsbury's Role in the Latter Day Middle School Movement

By 1983, the editor's role was becoming very intense. Lounsbury realized that if he were to keep up with the many monographs, and edit the *Middle School Journal* he would need to retire from his position as dean of the school of education at Milledgeville.

He retired and at that time the school changed its name to the John Lounsbury School of Education.

When the number of books and monographs published by NMSA began to increase, Lounsbury requested that someone be asked to take over as journal editor so that he could devote himself to the other publications. Thomas Dickinson took over responsibility for the journal in 1990. Thomas Erb is the editor today. Mary Mitchell is now Designer and Editorial Assistant for NMSA publications and remains Lounsbury's assistant to edit and publish for NMSA (NMSA, 1998). Ed Brazee is now editor for NMSA publications with Lounsbury as senior editor. Lounsbury has continued to attend every NMSA national conference since its inception and has become known as the "book man" working in the conference book store, talking with people and making sure they had the right book for whatever was their concern or interest. The National Middle School Association currently as of 2006 statistics, has 30,000 plus members and has one of the largest attendances (over 10,000 attending in Portland, 1993) at their national conference of any educational organization. Lounsbury was, again, one of the keynote speakers for the NMSA national conference November 2006 in Nashville, Tennessee.

Besides being Senior Publications Editor for NMSA, Lounsbury is Co-director of the *Georgia Lighthouse Schools to Watch* program, a volunteer effort. "The Lighthouse Schools to Watch program recognizes distinctive middle schools that are achieving at high levels and who are committed to continuing growth and excellence. These schools meet fully the criteria in five categories: high academic achievement, a commitment to young adolescents, a shared vision, a positive school climate, and family and community

partnerships” (Georgia Middle School Association, 2003, p. 1). Lounsbury mentioned that the

Georgia program is distinctive from other recognition programs. While it includes recognition, it’s not *just* recognition –it’s a school improvement program, unlike School of Excellence, because it requires continuous improvement. After they’ve been a Lighthouse School for a year, they have to submit a written report on the five criteria, and the year following that they have to be visited again. These are schools that are good, but they are still getting better (Lounsbury, May 24, 2005, interview p. 61).

Lounsbury helped create the application process and is one of the visiting team members for this endeavor.

Countless awards and accolades have been given in honor of John Lounsbury from the dedication of the New Hanover High School Yearbook, *The Hanoverian* (Wilmington, North Carolina) in 1950 and also the Berry College yearbook, to the most recent presentation of the Lifetime Achievement Award from the National Forum to Accelerate Middle Grades Reform and subsequently being honored in the National Congressional Record. Yet Mary Mitchell, his associate for 20 years stated, “He’s embarrassed by his fame. He comes back from [a meeting] with a little plaque that somebody would give him, and he’d say, ‘I was so embarrassed . . . I don’t deserve this’ (Mitchell, 2005 interview p. 14). He has received more awards than one could list.

When talking with Dr. Lounsbury about his long career he said, “I’ve been lucky to have good health to stay active and the job opportunity that I enjoyed that I could stay active. I think it was John Dewey who said, ‘to find out what one is fitted to do and have the opportunity to do it, is the secret of happiness” (Lounsbury, July 6, 2006 interview 5, p. 55). John Swaim said, “I think John was the humanist out of all of [the founders], and that brought a humanistic viewpoint to the middle school movement” Swaim, 2006

interview p. 22). Almost all of the interviewees mentioned that Lounsbury's caring attitude was the most important factor of his success and what he best modeled for all within the middle level movement (McEwin, 2006, interview p. 4; Mizzelle 2006 interview p. 13; Salyers 2006 interview p. 8).

Response to Research Questions

This part of the Findings Section reports the responses to the four research questions. The research questions were added to the interview process with Lounsbury at the fourth interview to bring more organization to his responses and to hone in on his beliefs and perceptions about the specific research questions.

During the past two years, this researcher has collected data through the interview process to determine the answers to four specific questions. The researcher did not ask Lounsbury these questions directly until the fourth interview. However, he gave answers to these questions in many statements and conversations throughout the two year period.

The same four questions were asked of the twelve middle level leaders interviewed during the 2006 interviews to seek corroboration and add detail to Lounsbury's answers. These interviews were phone interviews that were tape-recorded following the American Historical Association 1990 Recommendations for Oral History interviewing (Appendix E). The following is a compilation of the answers given by Lounsbury and the verification or contradiction from other interviewees. The answers are arranged first by the categories which emerged from the analysis of the data. The questions are reported in the sequence in which they were asked. After each question is stated the responses are discussed by the categories which emerged as responses were analyzed.

Interview Question One

The first interview question asked of all participants was, “What led Lounsbury and others to develop & promote the middle school movement?” The responses for each category are discussed below.

Answer Category One-Developmentally Appropriate Education for Young Adolescent Learners

When analyzing the responses of all interviewees, there were eight references made about needing to respond to the developmental needs of the young adolescent as a major reason for promoting the middle school movement. John Lounsbury had been promoting this developmentally responsive education for years, even before the middle level movement. Lounsbury had been involved with junior high schools since the late 1940’s when he did his student teaching at the junior high level. He was actively involved in trying to bring about what he referred to as the “junior high renaissance” (Lounsbury interview 4, July 5, 2006, p.1). One of his earliest assignments as a supervisor was to convert two elementary schools into junior high schools. “I didn’t know anything about junior high schools, [so] when I went off to Peabody in the summer, the focus of my study was the junior high school. . . . I did my doctoral dissertation on the role and function of the junior high school. That has been the focus of my professional service and professional activities ever since” (Lounsbury, July 5, 2006, interview p. 5).

Thomas Gatewood, the first editor of the *Middle School Journal*, stated his understanding of Lounsbury’s focus this way,

Lounsbury . . . focused on the age group, he focused on the child, and he focused on things in schools that were designed or developed, or should be designed and developed to represent what was known about that age

group. He had little [appreciation] for things that had been carried out of high school that had worked their way into junior highs that really did not represent the best interest in these early adolescents (Gatewood, 2006, interview p. 10).

Lounsbury's central focus has always been and continues to be what is good for young adolescents.

Answer Category Two-Dissatisfaction with the Junior High

Although Lounsbury only made reference to the dissatisfaction of the junior high school twice during the two year span of interviews, there were a total of nine references made to suggest this possibility. Many had the growing sentiment that the junior high renaissance, which Lounsbury had been working to implement, was just not happening. This dissatisfaction with the way junior highs were being run was a growing sentiment which was mentioned by several interviewees (Gatewood, 2006, interview p. 10, Alexander as reported by McEwin, 2006, interview p. 12-13). There were many reasons for the growing dissatisfaction, which will be discussed under research question number two. Ken McEwin, middle level researcher and long-time friend and colleague of William Alexander [deceased], who was the first to use the term "Middle School" related that William Alexander was supposed to give a speech at a Cornell conference on the "dynamic junior high school". When Alexander and others in his group were delayed in the LaGuardia Airport, they began to discuss the conference and the dynamic junior high. Alexander, reported McEwin, decided that "the junior high was no longer dynamic and something . . . needed to be done, so he changed the speech and proposed what we now consider the middle school concept or the middle school in the United States" (McEwin, 2006, interview p. 13). When William Alexander mentioned "middle school" in 1963

which ushered in the middle level movement, it was a natural fit for Lounsbury and all of the others who were a part of the junior high reform movement to continue advocating for quality developmentally appropriate education for young adolescents, but under the new title—the middle school.

Although early middle school advocates would often pit the two institutions in opposition of each other, the junior high versus the middle school, Lounsbury suggested that this was not really the way it had been. “As we began to work toward it, we realized that it really wasn’t one or the other and that the early junior high school [had been] in fact trying to do what the middle school was [now] trying to do” (Lounsbury, July 5, 2006, interview p. 2). The name change gave a new start toward achieving the ultimate goals of developmentally appropriate quality education for the young adolescent. George Melton of the National Association of Secondary School Principals—middle level council, came up with the term “middle level.” “So we began to use that term and talk about middle level education as opposed to junior high school education and I think that’s much better because it’s all dealing with the education of young adolescents—kids in the period between childhood and adolescence—in the age range of ten to fifteen” (Lounsbury, July 5, 2006, interview p. 2). Lounsbury suggested that in the early days of the middle level movement, most got caught up in the general school organization; the grade configuration and the structure of the time during the day. The public saw the middle school concept as primarily a school organization, grades six through eight—as opposed to junior high school—grades seven through nine. Lounsbury suggested that “is still a problem because many people think of middle school almost exclusively in terms of school organization . . . but that really wasn’t the essence of it at all. In fact, it’s a

philosophical concept; it's a set of beliefs about kids and learning and how they should operate" (Lounsbury, July 5, 2006, interview p. 3).

Answer Category Three -A New Rallying Point

For Lounsbury the "key thing is an appropriate education for a young adolescent" (Lounsbury, May 24, 2005, interview p. 30). This was his philosophy even during his junior high years, but "now we had a new rallying point—talking point" (p. 30).

Lounsbury also points out "as history shows, it's much easier to build a new institution than to change an old one. And so it was difficult to change the junior high school, but when you say, 'Well, we're going to build a middle school' it has a chance for a fresh start" (Lounsbury, July 5, 2006, interview p. 5). Because the junior high reform movement was generally recognized as necessary, this new middle level movement began to grow rather rapidly. Lounsbury was the only interviewee to suggest that the middle school concept was a new rallying cry.

The fledgling organization of Midwest Middle School Association began to develop because of this rallying point of a new organization and began meeting to help further the cause of young adolescents. As an advocacy group they began a National Organization "before it should have. In other words, they had no business claiming to be the national association. They just did this. They had hardly gotten their own Midwest association underway. They had no real budget, no real membership. It was a stroke of genius, in a way, but it was kind of a risk. They just did that" (Lounsbury, July 6, 2006, interview p. 4). But it was a "good indication of the passion that existed among the early National Middle School Association people" (p. 4). Attending the early meetings of the NMSA and gathering with other members "was a kind of religious experience. There

was a real spirit and camaraderie about the early middle school. Everybody was gung-ho” (p.5). Lounsbury suggested that the “middle level concept is a chance [for a fresh start], to get at it again, to break out of the barriers of periods and subjects and the routines and textbooks and so on and build learning experiences that are based on what we know about kids and learning” (Lounsbury, July 5, 2006, interview p. 8). This new opportunity is based on the new rallying point of a new name for the education level of young adolescents; the middle school.

Answer Category Four- Chronological Coincidence or Timing

John Lounsbury used the term “Chronological coincidence” to talk about the growth of the junior high (Lounsbury, May 24, 2005, interview p. 23 & 24). The coincidence of events, of mindsets, and of the persons who were in leadership, were all factors for that tremendous growth and advancement of the junior high school. When asked if that chronological coincidence was also at play in the success of the middle school, Lounsbury talked about several coincidences that were in play during the early days of the middle school movement. Two of these were the need for new buildings because of tremendous population growth and the need for a desegregation plan. Lounsbury stated, “a number of factors converged to make it possible” (May 24, 2005, interview p. 23). Integration was a chronological coincidence which lent its support for the advancement of middle schools. Bringing Blacks and Whites together in a newly established middle school “was something you could do. . . . It was an inevitable and desirable way to begin integration—by switching around schools and putting kids together at certain levels a little more easily” (Lounsbury, May 24, 2005, interview p.24).

Although others did not use this same terminology several interviewees suggested the same type of coincidences. Gatewood stated, “people being in the right place so that they could make a difference, . . . forward-looking persons stepped forward with plans to make [it] happen (Gatewood, 2006, interview p.132). McEwin suggested also that, “for example, Bill could have made the speech and nobody ever knew he made it, but instead there were practitioners across the country—I’m talking about public school people—who knew that a change needed to be made and took his ideas and made those changes” (McEwin, 2006, interview p. 15). There were many coincidental factors then that interviewees suggested as reason for the middle level movement’s success.

Interview Question Two

The second question that was asked of the interviewees was, “What factors present in the 1950’s and 1960’s necessitated reform for the education of young adolescents?”. The three answer categories are discussed below.

Answer Category One-The Unsuccessful Junior High Factor

Because early education leaders in the 1910’s adopted the name “junior high school” and because of such great dominance of the high school in the American education system, the junior high in the 1950s and ‘60s had become just that—a “junior” high. The junior high was clearly a success numerically, “but it was clearly like the high school—fully departmentalized, emphasis on subjects, grades, college prep, . . .doing things just like the high school and failing then to meet the needs of these kids who were not yet adolescents” (Lounsbury, July 5, 2006, interview p. 4). Educators in general were beginning to recognize the inadequacies of the junior high. Lounsbury noted,

historically it's important to recognize that there really is not significant difference between what was advocated for the junior high school in 1910 and '20 and what the middle school advocated in the sixties and seventies. And we still haven't gotten there. We are still fighting the same battles; lack of understanding, appreciation of this age group—which to me is the critical shortcoming, the critical missing piece is lack of understanding on the part of the general public . . . about the nature of early adolescence and the special needs they have that call for a school program that is not just like either an elementary school or like a high school (Lounsbury, July 5, 2006, interview p. 6).

So many of the same problems found in the early days of the junior high were still present in the formational days of the middle level movement. Lounsbury also comments that his disappointment with the junior high school was

exactly the same as the disappointment with the middle school. You organize, but then you stopped—you didn't carry it forward. The junior high school was intended to do the same kind of things as the middle school, but neither one has fulfilled it. They succeed organizationally, but not philosophically, not instructionally, not in curriculum, not in climate (Lounsbury, May 25, 2005, interview p. 52).

Although Lounsbury expresses disappointment here with the success of both junior high and middle school, his views about the future of the middle school remain optimistic, which will be shown in the section under the fourth research question.

On Thursday, May 3, 1962 John Lounsbury, Jean Marani and the ASCD Commission on Secondary Curriculum conducted a shadow study of 102 eighth graders in 98 schools in 26 states, recording the student's activities, conversations and tasks throughout the junior high school day. Lounsbury describes a shadow study as a "very, very good way to get a very realistic picture of what it's like" (Lounsbury, May 23, 2005 interview p. 9). After having read the many individual reports, comments and interpretations of this day in the eighth grade (Lounsbury & Marani, 1964) Lounsbury and others on the commission were certain that things "were not as good as they should

be” (Lounsbury, May 24, 2005, interview p.10) and began to discuss what must be done about the negative conclusions.

Answer Category Two-The Drop Out Factor Returned

The “drop out problem which was a part of the [original] reason for creating the junior high school” (Lounsbury, July 5, 2006, interview p. 5) began to surface again in the 1950’s and 1960’s again demonstrating the lack of success in the junior high school. Lounsbury suggested, “The inability of the junior high school to change was clear. It was stuck; it had its own tradition. It had become a *junior* [emphasis spoken] high school” (Lounsbury, May 24, 2005, interview p. 26). Students were beginning to think there was nothing new for them in school. It was boring. Lounsbury is the only person who addressed this issue during the interviewing, however, Fran Salyers did mention the issue of working with the “at risk” student to keep them in school was an issue in the early 1970s (Salyer, 2006, interview p. 8)

Answer Category Three-Factors Unrelated to Best Practice for Young Adolescents

Many factors present in the 1950’s and 1960’s were not related to the philosophy of middle level education, but for all the above mentioned reasons the middle school began to grow and prosper. Lounsbury continually returned to his same thesis however, that the need for reform of educational practices came from the need to do what is best for the young adolescent. He advocated that the middle school philosophy “is based on what we know about human growth and development, [but] it’s based on the concepts of the American way of life, which incidentally has not been traditionally practiced in [American] schools” (Lounsbury, May 24, 2005, interview p. 27). A democratic

understanding of classroom interaction is understood by Lounsbury as an essential part of the American way of education.

Lounsbury suggested another factor present in the 1950's and 1960's was the "growing population" which advanced the need for more buildings to be built but "not for the advancement of the philosophy" (Lounsbury, May 24, 2005, interview p. 24). New buildings were also built as part of the tremendous desire to improve the high school during the 1950's and 1960's. Lounsbury mentioned the practice of building new high schools and using the former high school building for the middle school. These buildings were outdated, too small, or substandard for a high school. He added, "our society has always given great status to the high school: the community's pride, athletic teams, and all that. So when the high school [building] is not good enough for the high school, they build a new high school, and then the junior high or the middle school gets stuck with the old building" (Lounsbury, May 24, 2005, interview p. 25).

Third Interview Question

The third interview question answered by each of the respondents was, "What are essential elements for successful education of the middle level student?" Lounsbury and others, who were interviewed, discussed many of new educational elements which were ushered in by the middle school movement. These new features such as teaming, interdisciplinary teaching, advisory, exploratory classes, flexible block schedules and team common planning time are just to a few (McEwin, Dickinson and Jacobson, 2004; Erb, 2001, and Erb, 2005) which were named during the interview process. Due to Lounsbury's reference to these topics in answer to many questions, the researcher has condensed and tried to eliminate repetitions where it seemed prudent to do so.

Answer Category One-Integrative Education

One of the “most recognized characteristics of the modern middle school is interdisciplinary teaming” (Lounsbury, July 5, 2006, interview p.11). Teachers, possibly of varying content specialty, who group together as a team of teachers, work to find connections within what they are teaching so that it makes sense to the young adolescent student. Teachers attempt to bring the four content areas into a topical theme.

Lounsbury advocated for the “ultimate concept [of] integrative education, which goes beyond interdisciplinary planning” (Lounsbury, July 5, 2006, interview p. 12).

According to Lounsbury this essential element for successful middle level learning starts with the student helping to make the decision about the focus of the study. The student will raise questions about the topic or theme and the learning experiences will go from there. The major difference between interdisciplinary and integrative teaching is that in integrative you have “left the bounds of subjects and are going where students want to learn” (Lounsbury, July 5, 2006 interview p. 13). Lounsbury responded to a question about accountability in relation to letting students help plan the learning in this manner,

we should recognize that what we’re talking about in no way would reduce the academic rigor . . . I’d rather use the word ‘challenging’ . . . good challenging academic education which leads to knowledge acquisition. But also you’re doing it in this more learner-friendly way; you are achieving the other objectives of education much more effectively (Lounsbury, July 5, 2006, interview p. 15).

Lounsbury repeatedly suggested that two-person teams would assist in the idea of integrated curriculum, because teachers would quit thinking in terms of “one content” and then they would begin to see the curriculum in a more integrated fashion.

Answer Category Two--Student Centered Education

According to Lounsbury, human beings innately want to learn. He suggested that all humans are motivated to learn, but what we must be sure of is that “their motives are aligned with ours. We’ve got to tap the inherent desire to know and learn” (Lounsbury, May 24, 2005, interview p. 39). *The Eight Year Study*, according to Lounsbury, and the Alpha study are both proof that “in the long run, [students] are going to learn as well or better [than those who must follow standardized, test driven curriculum]” (Lounsbury, May 24, 2005, interview p. 39).

Answer Category Three: Quality Relationships with Caring Adults is an Essential Element for Success

The idea of attending to students affective needs was ever-present in Lounsbury’s work and words. Many early reformers suggested that a separate time in the school day is needed to attend to needs of the middle school student and so a course period which some refer to as “advisory” has been developed in many school schedules. Lounsbury suggested that although good relationships are the key to success, whether you have an advisory program or not is really not so critical. He suggested “the more we integrate curriculum, the less we need artificial efforts to deal with students’ personal social needs. In a fully-integrated curriculum . . . you are taking care of their affective needs in conjunction with their cognitive needs” (Lounsbury, May 24, 2005, interview p. 49). When asked the question in 2006, about essential elements, Lounsbury suggested that an “advisory time- when you can have a small group of students under your tutelage to help them deal with the personal social needs that are so prevalent at this age and which are not likely to be touched on or cared for under departmentalized structures that we still have”, (Lounsbury, July 5, 2006, interview p. 26) should be considered. McEwin

suggested that “having common planning times is the way that teachers who teach young adolescents work together so they can do a better job and get to know the students better. [T]hat’s one of the essential elements” (McEwin, 2006, interview p. 19) and then he suggested an advisory program where relationships between students and adults can be fueled is also an essential element. Almost every other interviewee mentioned the relational aspect of importance to success at the middle level.

Answer Category Four-Good Core Curriculum

Lounsbury explained that core curriculum in a contemporary use usually refers to the required or tested core courses. Originally, Harold Albery developed an idea of Core Curriculum where one teacher would be responsible for a group of students and responsible for all of the subjects (Lounsbury, May 23, 2005, interview p. 34). The approach was through a problem-centered block of time, an approach like what was described above named integrated curriculum. This idea had its roots in the early Progressive Education movement. Lounsbury suggested that this core curriculum would be enhanced by the two-person team.

In discussing curriculum essentials Lounsbury stated, “Now the ultimate concept is integrative education, which goes beyond interdisciplinary planning” (Lounsbury, July 5, 2006) and he stated that this would include student involvement in the planning stages. Thomas Gatewood disagreed with Lounsbury concerning the importance of integrated curriculum, but like Lounsbury, he felt that “organization of a[n interdisciplinary] teaming community is very critical [along] with good instruction and good curriculum” (Gatewood, 2006, interview p. 19 & 20). McEwin also disagreed with Lounsbury about an integrated curriculum being essential; he stated that the curriculum needed a “really

strong focus on the basic subjects . . . and of course the curriculum needs to be rigorous” (McEwin, 2006, interview p. 20 & 21).

Lounsbury summarized and condensed his own answers in July of 2006 when he made this statement,

the short form is simply to say that the middle school concept is an effort to create school programs that reflect what we know about young adolescents and the principles of learning. That’s it. Simply. Nothing more. Anything else is merely an elaboration. What we are trying to do in the middle school is create school programs that reflect what we know about kids at the age level and what we know about learning. . . .But the fact of the matter is American education as it has operated is not created and is not organized and operated in light of what we know about kids and learning. . . .So the problem is to get out of what we’ve been doing for so long, and we keep on doing. But we’re still doing it. But there’s no research to justify [what we have been doing]” (Lounsbury, July 5, 2006, interview p. 7-8).

Lounsbury’s statement above introduces the next research question.

Research Question Four

The last interview question asked of all participants was, “What is the future of the middle school as you see it?” Lounsbury immediately and resoundingly replied to this question by saying, “The middle school concept will succeed. Indeed it has to succeed. I don’t think there is any alternative” (Lounsbury, July 5, 2006, interview p. 32). The middle school concept is based on the realities of human growth and development and the democratic way of life. According to Lounsbury, “The middle school concept has not been tried and found wanting. Rather it has been tried and found difficult to do except in part” (Lounsbury, July 5, 2006, interview p. 34). An ever present implication in all that Lounsbury has stated and much of the middle school literature since 1980 has been to say that the middle school philosophy has only been implemented “in part”.

Most would suggest that the structure of the middle school has been implemented but not the curriculum, which is both the most important and the most difficult to implement (McEwin, 2006, p.21; Salyer, 2006, interview p. 9). Lounsbury explained the problem with this lack of full implementation,

[T]he early assessments of the early middle schools did not show advanced—improved student achievement. We created teams and declared victory when we hadn't done anything. And so the early teams—schools that were early teamed did not show an improvement in student achievement and so we have been saddled with these research studies which show we haven't done anything, but when we look at those studies of schools that have done something, Flowers, Mertons and Flowers, . . . In those schools that put in practice, most of the criteria that they use to indicate they have in fact implemented the middle school concept—those show real gain (Lounsbury, July 5, 2006, interview p. 34).

Thus there is new research that suggests how successful the middle school concept is if implemented completely, so Lounsbury believes the future is bright, yet he suggested many qualifiers that must be considered when thinking of the future of the middle school movement.

Answer Category One- A Qualifying Theme Of Prepared, Concerned Teachers

The middle school has always been a bottom up movement; a teacher driven movement. From the earliest beginnings with the Midwest Middle School Association, the middle school movement has been a “grass roots” movement drawing its membership from concerned teachers. However, most of the teachers who teach at the middle level continue to be educated in either elementary or secondary programs and not specifically for the young adolescent. Lounsbury commented that good teacher preparation is important to continued success; “we’ve made tremendous progress in teacher education. For them to be participants, rather than observers—and now, of course, we’ve got them doing actual teaching” (Lounsbury, May 24, 2005, interview p. 46). McEwin concurred,

“the dispositions in many ways are as important as the other characteristics are—attributes of successful teachers. And I’m sure you’re well aware that the most powerful school-related influence on students learning is the quality of the teacher teaching” (McEwin, 2006, interview p. 23). When referring to his belief about the future of the middle school, Thomas Gatewood, first editor of the *Middle School Journal*, had this to say about these teachers in this grass root movement, “we have so many more people who work in middle schools now who want to be there, who have been praying to be there, teachers and administrators, there’s just a solid foundation now within the middle school and [they are] going to keep it going (Gatewood, 2006, interview p. 16). These teachers who are specifically prepared to teach young adolescents and are concerned for young adolescents are key to the future of the middle level movement.

Along with specific teacher preparation for the middle level, Lounsbury advocated for “common planning time, and teachers working together, and staff development—to do the planning, and to do the interdisciplinary teaming” (Lounsbury, July 5, 2006, interview p. 29) that is required for effective teaching. “If kids are on a team, and the team has common planning time every day, and there’s enough time for that—as well as personal planning—achievement goes up . . .if they do it over time, that’s the key thing: to implement the middle school on a consistent basis over time will lead to improved academic achievement” (Lounsbury, May 25, 2005, interview p. 29).

Answer Category Two-A Qualifying Theme of Serving Today’s Youth

The middle school movement, and according to Lounsbury, like the junior high movement before it, has central the theme of “serving youth wherever they are with what they need” (Lounsbury, May 24, 2005, interview p. 57). When asked about content-

driven standards, Lounsbury reiterates the mission of the middle school movement when he said, “I am so disturbed by the continued emphasis on middle school’s job is to prepare kids for high school, [he rapped the table for emphasis]. Our job is to prepare them for life, and if we do that well, they’ll handle high school . . .It isn’t just learning information; it’s growing. The middle school is a growing place, not just a learning place” (Lounsbury, May 24, 2005, interview p. 68).

Probably the most adamant statement made by Lounsbury was his understanding of what the middle school movement is all about when he stated, “the real strength of the National Middle School Association is its singular focus. It is not set up to be a teachers’ organization . . . It is committed to the education of young adolescents” (Lounsbury, May 25, 2005, interview p. 5). It is this, which John H. Lounsbury stood for in the junior high movement, in the beginning of the middle school movement, and will stand for in the future education of young adolescents, whatever name is attached to it.

Summary of Findings

John Lounsbury, one of the founders of the middle school movement, was born in Brooklyn, New York on January 1, 1924. Ordinary beginnings of playing with friends, going to school, enjoying family life, were the beginning of an extraordinary life. After having survived World War II, Lounsbury went on to excel in college and graduate school and to begin to make his mark in the area of junior high education. When a group of individuals got together to challenge the educational world to do something better for young adolescents, Lounsbury was at the forefront of the cause which was the middle school movement.

How can a life of writing, editing, speaking, motivating, advocating, mentoring, and caring for young adolescents and those who teach them be summarized into so short a document? The recording of the details seems to trivialize the life, but the work must be written so that others who follow will be inspired to give of themselves as well. John Lounsbury articulated a philosophy reflective of giants before him, Dewey, Kilpatrick, Van Til and Montessori to name a few. Those who now work with and study the education of young adolescents look to John Lounsbury in the same manner. At the recent NMSA conference held in Nashville, TN young pre-service teachers waited in line to get to speak to or get the autograph of John Lounsbury, the present day giant in the field of middle school education (Gloer, November 3, 2006 personal observation).

Four research questions were answered during the days of interview and the answers recorded will be archived in the Oral History Department of Baylor University and the National Middle School Association Archive at the University of Vermont. The answers to these questions given by Lounsbury and also by thirteen colleagues were analyzed in a constant comparative manner, and were also compared to middle level literature and to other recorded historical documents. The reason, according to Lounsbury, for the development and promotion of the middle school philosophy was to better promote the philosophy of student centered democratic education; to promote a developmentally appropriate education for young adolescents. The most consistent answer from Lounsbury concerning factors present in the 1950's and 1960's which necessitated reform was simply that the junior high had become defective and a 'fresh start' was necessary to get educators back on the right road toward student centered education. Answers to the question about essential elements of a successful school were

a bit more diverse between interviewees and less singular in their focus by Lounsbury, but still the central theme was that we must look past single elements and look toward a whole philosophy of what is best for serving the whole person of the young adolescent.

Lounsbury emphasized his point by stating,

The middle school concept is an effort to create school programs that reflect what we know about young adolescents and the principles of learning. That's it. Simply. Nothing more. . . .Create school programs that reflect what we know about kids at the age level and what we know about learning (Lounsbury, July 5, 2006, interview, p. 7).

This final question, “What is the future of the middle school movement in your opinion?” and “What about the National middle level organization?” was an easy consensus from all those interviewed. The resounding answer was that because there are so many teachers who care for young adolescents, because of the legitimizing work that has been accomplished through the work of people like John Lounsbury, and because the grassroots membership of NMSA is committed to serving the young people with whom they work—the future is very bright for the middle level movement.

Summary

This chapter reported the findings of the data collection and analysis of the interviews of John Lounsbury over a two year period. The data from phone interviews of twelve colleagues, Lounsbury's wife and his editorial assistant was also analyzed and the conclusions have been reported in this chapter. The analysis discussed was organized by themes which surfaced from the interview data. Chapter five will discuss the contributions of Lounsbury and the implications of this study for the middle school movement as well as suggestions for further study.

CHAPTER FIVE

Summary, Implications, and Suggestions for Further Study

Summary

John Lounsbury has been advocating for better education for young adolescents since the late 1950s. In the book, *Modern Education for the Junior High School Years*, Van Til, Vars and Lounsbury (1961) suggested several ways that the education of the young adolescent should vary from what was present in the typical junior high of the 1950s. In the last chapter of this book the authors laid out their idea of what was essential for sound education of young adolescents in the junior high program of the 1960s. Interestingly, almost thirty years after Van Til, Vars and Lounsbury developed their list of twenty-four essentials for the junior high program, the Carnegie Council on Adolescent Development made eight similar recommendations in their report, *Turning Points* (1989) which were later revised into seven recommendation in the Jackson and Davis *Turning Points 2000* (2000) document. The twenty-four standards suggested in the junior high recommendations can be found listed in Appendix O, shown in comparison with the more contemporary documents, *Turning Points 2000*, and *This We Believe* (NMSA 1995, 2001, 2005). Of course it is not as surprising that the junior high document and *This We Believe* are similar considering that two of the authors of the junior high book, Vars and Lounsbury, also helped to author the NMSA documents. From 1961 until 2005, Lounsbury consistently preached, wrote and supported the same message; young adolescents deserve quality developmentally appropriate, democratic

education. His message never altered, and he continues to be at the center of advocacy for the middle level movement.

Fifty plus years of writing, editing, speaking, advocating and teaching about young adolescents might suggest in and of itself that Lounsbury should at least win a longevity award for the study and promotion of the middle school movement.

Interestingly enough, not only did the National Middle School Association name their most prestigious award after Lounsbury, but they also honored him as a recipient of the award. So why is Lounsbury so important to the middle school movement? Sherrel Bergmann, 1999 Winner of the John Lounsbury Award, said that the reason NMSA named its most prestigious award after him was “because everybody reveres him . . . that early board of NMSA [who decided on the name] wanted to recognize John for what he had contributed, for his writing, for his leadership, for being who he was and for helping the association get started” (Bergmann July 18, 2006 interview p. 26). Ed Brazee, current editor of NMSA publications said,

When you say John Lounsbury, virtually everyone—I’ll say—take away the virtually—everyone or anyone who knows anything about middle-level education knows who John Lounsbury is. From conferences, from anecdotes, from reading the research, the shadow studies, from reading the literature and the many articles and books that he’s written over the years. John has been able to focus like no—almost no other, and has been at this, and is still involved in it on a very high level right now.

I mean, a lot of the other people have retired, and that’s natural. But, we’ve had the good fortune to have somebody like John Lounsbury to span the junior high school movement through the middle school movement part one, what I call part one, and hopefully as we move into part two. He’s just a very unique person. They don’t come around very often like John Lounsbury, and to have that award named after him is just—it just rings the right bell (Brazee, July 25, 2006, interview p. 33).

The words of these two leaders in the middle school movement demonstrated how important Lounsbury is to the leadership of the movement.

Summary of the Findings by Question

Although the literature listed many reasons for the development of the middle school philosophy, there is really only one reason which surfaced over and over again throughout the interviews that caused Lounsbury to join with others rallying under the new banner called middle school. This one reason was to promote the reforms which he had been calling for since the 1950s. Lounsbury wrote about his dissatisfaction with the junior high in the book, *Modern Education for the Junior High School Years*, (Van Til, Vars, Lounsbury, 1961), and in his article “Junior High School Education: Renaissance and Reformation” (Lounsbury, J. H., 1960b). In these texts Lounsbury laid out a plan for many of the same things for which he continued to advocate under the middle school banner. The new movement called middle school provided a new rallying point (Lounsbury, May 24, 2005, interview p. 29). The new name provided impetus to promote and call others’ attention to the renaissance for which Lounsbury had already been advocating in the junior high movement. Lounsbury related, “As we began to work toward it [the middle school development], we realized that it really wasn’t one or the other and that the early junior high school was in fact trying to do what the middle school was trying to do” (Lounsbury, July 5, 2006 interview p. 2) Lounsbury concluded,

And as history shows, it’s much easier to build a new institution than to change an old one. And so it was difficult to change the junior high school, but when you say, “Well, we’re going to build a middle school” it was a chance for a fresh start. And so the middle school movement began to take hold and grow rather rapidly because it clearly provided an opportunity for reform that was generally being recognized as needed” (Lounsbury, July 5, 2006 interview p. 5).

Perhaps then the research question, what led Lounsbury to promote the middle school movement, which was posed earlier, can only be answered in conjunction with the

second research question. One needs to ask why Lounsbury was advocating for a junior high renaissance in the first place.

Many factors indicated the need for junior high reform in the 1950s and 1960s. Each factor was a vivid demonstration that American Education in the middle was failing. The launch of the Russian spacecraft, Sputnik, was perceived as demonstrating the United States' weakness in science. The increasing drop-out problem and the requirement for desegregation were two other concerns noted by some. There were, however, just two factors that were mentioned over and over again in the literature, in interviews with Lounsbury and consistently affirmed by interviewees. The first factor, earlier maturation of young adolescents, suggested a need for grade restructuring. Thus the literature in the earliest days of the middle school movement focused mostly about the grade configuration, teaming, or general restructuring of young adolescent education (Anfara, V. A., 2001; Alexander, W. M., et. Al; Baldwin, G.H, 1974.; Trauschke, E. M. and Mooney, P. F. 1974; Brown, K., 1974; Compton, Mary, 1968) The second factor, one which Lounsbury returned to over and over again, spoke to all other issues; the junior high was just not meeting the needs of the young adolescent. Gordon Vars voiced his agreement with Lounsbury's concerns when he stated,

there-conceptualizing of good education for young people in the in-between years is the way I described this 60s so-called reorganization movement. Adjusting the bracket from seven, eight, nine to six, seven, eight, is merely a reflection that time moves on and young people do grow up faster, but the reason that we have to keep hammering away at the need for a total program of quality education for young people at these ages is that there are so many institutional factors and societal factors that run counter to—especially the democratic value kind of a thing (Vars, September 26, 2006, interview p. 12-13).

Lounsbury also suggested that the most important issue was that the junior high had become in actuality not what young adolescents needed. He stated, “I do think historically it’s important to recognize that there really is no significant difference between what was advocated for the junior high school in 1910 and ’20 and what the middle school advocated in the sixties and seventies” (Lounsbury, July 5, 2006, interview p. 6). Lounsbury also wrote, “the problem with the junior high school was not in its intention but in its implementation” (in Irvin, J. L., 1992, p. 7). One must look at the critical elements of the middle school philosophy as Lounsbury sees them, to understand what he felt must be implemented to achieve success. Lounsbury stated that one should not look at the middle school concept as mere elements to be initiated. The middle school concept is a philosophy. Lounsbury said,

One of the difficulties, . . . with the early middle school was it became caught up in being looked at in terms of characteristics. And so a lot of early middle schools simply tried to do a few of these things—put in an advisory program, have interdisciplinary teams, have exploratory—and so if you’ve got these things, you’ve got a middle school. But they failed to really get the philosophy and the view. Ultimately the middle school concept is a philosophy of education, a philosophy of life, a way of life. And you’ve got to have that passion, that view of it. It isn’t something that you can do just by following a checklist of characteristics. And that’s why so many middle schools have teaming and have teams, but they’re not really doing anything with these teams except maybe a little correlation. But again, that goes back to the problem of teachers not having any experience themselves [to draw upon] (Lounsbury, July 5, 2006, interview p. 30).

During the recent William Alexander Memorial Lecture at the National Middle School Association, Nashville, Tennessee, (November 3, 2006, personally attended) Lounsbury stated that the middle school concept was a set of beliefs, a philosophy stemming from such educational giants as John Dewey and William Heard Kilpatrick. In the July 5, 2006 interview, Lounsbury described this philosophy as, “Putting into the child or

drawing out- is the same thing, where in education—you draw the education out rather than putting it in. The students themselves are the instigators. It’s all philosophically tied up together” (Lounsbury, July 5, 2006, interview p. 25).

Lounsbury was most emphatic that the future of the middle level movement was assured. There was almost a unanimous agreement between all the interviewees that the future of the middle level movement was positive. However, every interviewee who agreed in this positive way also placed some reservation on this success. There were three areas of reservation which seemed to surface. The *No Child Left Behind Act* was definitely at the center of concern for successful and complete implementation of the Middle Level philosophy. Speaking of the way the *No Child Left Behind Act* has or is effecting the middle school movement, Lounsbury said, “Well, the concept—marvelous. Who could be against it? We don’t want to leave any child behind, no question about it. . . . But we’ve got to live through the No Child Left Behind testing frenzy—the obsession with it—which is just really terrible” (Lounsbury, interview May 25, 2005 p. 23). He continued to explain how this concept of not leaving any child behind is so important at the middle level,

[T]he middle school is in the best position to do something about it, because we get them at this second and last chance. At the time of early adolescence, youngsters can overcome the negative years that they may have had. Because this is the time when they look again at themselves. But if they don’t do it here, then it’ll never happen. So you can—when you’re a young adolescent—get a fresh start, think through, and may be—be supported, and break out of the cycle of poverty and all of those things that have occurred. But if it doesn’t happen there, it isn’t going to happen at the high school level. You don’t change the attitudes and the beliefs of eleventh and twelfth graders. And so we often view the middle school as the second and last chance to impact the lives of people and the lives of our society (Lounsbury, May 25, 2005 interview p. 24).

Ross Burkhardt explained his comments this way:

I'm not against excellent education. I'm not against high standards and holding kids to high standards, but I also think that we have to remember the first and foremost we're teaching kids. And secondly, we're teaching curriculum. And I think this thing [No Child Left Behind] has it backwards because it places an undoing influence on the test (Burkhardt, 2006, interview p. 25).

The second concern for the future success of the middle level movement that surfaced during the interview process, was the need for young adolescent advocacy to assure future middle level concept implementation. The general public perception of young adolescents is rather negative. Many have suggested that young adolescents are simply 'hormones walking'. With these negative views of young adolescents, the middle level concept and those who are its proponents have their work cut out. The theme of advocacy for the young adolescent and for the best possible education for them came to the forefront during the interviewing process. Lounsbury spoke constantly of the need to promote the self-esteem of the young adolescent, to assure them of success and his many speeches were full of statements where he personally advocated to change the perception of young adolescents. John Swaim suggested that in response to both the negativity toward young adolescents and to the need for quality teacher preparation for this age group,

we need to go back to the people that will stand up for the political reality of it [specific certification for middle level teachers], and when those things come up, they need to get out there and fight for what's right. . . . So, the prospects, I think, look good, but we've got to keep—a vigil on those folks out there that are pressured, that would want to move in another different type of direction (Swaim, 2006. interview p. 19).

Burkhardt also suggested the need for positive advocacy if the middle level concept is to succeed,

but there are serious educators out there who continue to produce books, who continue to invent new aspects of curriculum, who continue to speak and inspire. And so the vision is firmly implanted, and the vision, from my estimation, will not be lost. There's just too many people who know what the right thing to do is and are going to continue to go ahead and do the right thing (Burkhardt, 2006, interview p. 26).

The third concern for future success of the middle level movement which surfaced during the interviewing was that of continued legitimizing of the movement. Since the inception of the middle level movement there has been research completed such as the Shadow Studies completed by John Lounsbury, a national association of middle school advocates has been formed known as National Middle School Association of which John Lounsbury has been a leader since the early formative years, and a respected and reviewed journal has been in print edited by Lounsbury from 1975-1990 and many monographs and books have been printed again with Lounsbury as editor. All of these legitimizing elements have certainly promoted the success of the middle level concept, but for the movement to continue these elements must continue and even expand. Lounsbury is still at the forefront of the continued expansion as just this November he, as editor of NMSA publications, produced three more books in time to display them at the National conference in Nashville, Tennessee (November 2-4, 2006). When asked about the future of middle level education, Lounsbury emphatically stated,

I am convinced the middle school concept will succeed. Indeed it has to succeed. I don't think there's any alternative. And the reason I'm so confident—though I recognize it isn't going to happen tomorrow is—that it has God and Uncle Sam on its side. And I say that with no attempt to be flippant and sacrilegious. But the middle school concept is based on the realities of human growth and development. The way the good Lord made us. And it is completely compatible—and in fact is in advocacy of—the democratic way of life, for which schools, incidentally, have not done a good job of preparing people. But if you look at it, really it echoes back to the Eight Year Study [originally published in 1942 by Harper and brothers]. There was a commitment there to build a school that was in

tune with democracy and the needs of society and the principles of learning. So there is a major historical understanding and depth to this whole middle school concept. This is not some quick grade silver bullet some professor or some group has come up with to try to make education better—we had a lot of those—but I think this does go back to really the fundamentals (July 5, 2006, interview p. 35).

Although Lounsbury was confident about the future of the middle level movement he was also cautious and stated,

we still haven't gotten there. We're still fighting the same battles—lack of understanding, appreciation of this age group—which to me is the critical shortcoming—[and] about the nature of early adolescence and the special needs they have that call for a school program that is not just like either an elementary school or like a high school. And the middle school movement—now under the leadership, primarily of the National Middle School Association—has advanced the middle school concept and is creating schools that are distinctly created in light of and for young adolescents and their nature and needs (Lounsbury, July 5, 2006, interview p. 6).

History has demonstrated that if there were fifty more years for Lounsbury to continue his advocacy for young adolescents, he would be doing just that. With his passion and zeal at the front, he would be cajoling others to join in the fight to provide the best democratic education possible for the young adolescent learner and the best preparation for teachers of this age.

Limitations of the Study

In preparing the literature review, the researcher read about Lounsbury. Most of Lounsbury's own publications were reviewed, his speeches were read or viewed, and articles about him were studied. In spite of extensive reading about Lounsbury and of his writings, one could not possibly know every experience that might have shaped his ideas and philosophy. After having had many conversations with Lounsbury over a two year period, some formal interview times and some informal times around the table and

although a great deal was learned about his thoughts and passions, one can still not say Lounsbury is completely known and understood nor his contributions to the middle level movement. Even though Lounsbury attempted to be completely transparent and open during the time he was interviewed, one could still not say that he has spoken everything there is to know. There are others who have known Lounsbury for many years and have walked with him through this journey of middle level formation and leadership. There are those who have experienced many of the things written about in this document while the researcher does not have first hand knowledge of any of the events discussed. Although one could argue that one who is not involved in the events might have better perspective to analyze the movement and Lounsbury's involvement, there certainly are limitations to the detailed information in this study. One researcher can plainly not know everything, so in spite of attempting all thoroughness, there will be limitations concerning the exhaustive nature of the topic. Although a great deal of time was spent in discussion and email with Lounsbury, the time spent was minute in comparison to a life spent working toward an understanding and development of a philosophy. One could spend years talking and watching and reading Lounsbury and still not know all there is to know about the middle level movement and the role of one of its founders.

Naturally seeking information and recall from someone who is 83 years old could be limiting in itself. One could suggest that the older Lounsbury gets, the more he will forget or confuse. This being so, it is a fortuitous matter that the interviewing started as early as it did, however, Lounsbury has not shown signs of memory confusion at all during the entire two years of the data collection. He has openly stated a time or two that he could not remember the exact details about an event but the meaning and significance

of meetings and events was never lost by Lounsbury. Never-the-less, there are some details which he forgot that could have been significant in understanding the complete story of the middle level beginnings.

A third limitation to this dissertation would be those limitations innate in the type of research. During oral history, a person makes choices about what to tell and what not to tell. Lounsbury answered every question which was asked of him. However, he may have limited his responses at times or added details to emphasize certain topics. He may have omitted details, concerns or thoughts. However, in interviewing thirteen other sources this was never apparent. Except for personal opinion, data from the other resources never contradicted what Lounsbury said.

There was one matter in which Lounsbury's testimony was found lacking. He never mentioned awards or accolades which were given to him unless asked about them specifically. Even then, he would not dwell on them or give much credence to them. Lounsbury was very eager to point credit to others and to play down his own importance in the movement. One of the other interviewees almost always had to add any detailed information to any of these situations.

One other limitation of this study would be the manner in which the questions were asked and the questions themselves. The interviewer may not have asked pertinent questions or omitted key follow up questions. Although the researcher studied interview techniques, this was the first such project undertaken by this researcher and skill at interviewing was limited. However, over a period of two years working on the project and interviewing many people, the researcher gained skill which made the follow up session with Lounsbury even more important. Lounsbury had been interviewed by others

previously. He was quick to anticipate the question. At times, it also appeared that there were additional questions to which Lounsbury wanted to respond. If those questions were not asked during a tape recorded session, he asked if a certain topic would be addressed. Before each taped session, Lounsbury always asked what the nature of my questioning would be during that period of time and after he was told, he paused silently, put his fingertips together and appeared to be collecting his thoughts. After a brief moment he looked up and nodded. After using this same procedure for the last taped session, the interviewer turned on the tape-recorder and stated the date and time. Then Lounsbury began talking about the topic without being asked a question and talked in a sequential and very articulate manner for several minutes.

Recommendations

This dissertation has addressed the contributions to the middle school movement of one of its founders, John Lounsbury. As previously noted, however, there are other founders who are still living. Two of these founders, Gordon Vars, and Ken McEwin, were interviewed for this dissertation, however, they were only asked questions concerning the events surrounding Lounsbury's involvement in the movement and the four research questions. They were not asked about their own participation in the formation of the middle level movement. Further in-depth interviews should be completed with each of the remaining founders while their memory of the early days is vivid. This would enable a complete study of the beginnings of the middle school movement to be made. For the sake of recording history of the movement and to record the thoughts, perceptions and viewpoints of each of these leaders this research should be completed before it is too late.

Conclusion

Through the study of the life of John H Lounsbury, this researcher made five conclusions concerning Lounsbury's beliefs. First, Lounsbury demonstrated that he believes sound education must be student centered. One cannot take a technique or strategy or structure and lay it on a school or a student and know that it will work as intended. The middle school structure did not work for all schools because they attempted to try on the structure and did not adopt the full philosophy. Lounsbury commented, "[T]hat still is a problem because many people think of middle school almost exclusively in terms of school organization. In fact, it's a philosophical concept; it's a set of beliefs about kids and learning and how they should operate" (July 5, 2006, interview p. 3). To be effective, education must be student centered and fit the needs of the learners.

Secondly, Lounsbury has shown that he believes curriculum must be based on the needs of the learners' developmental needs. If it is not, then knowledge alone becomes superfluous. Learners must make understanding their own and effective teachers know this and support it through needs based curriculum.

Third, Lounsbury demonstrated that he believes the best teachers have a driving vision which is determinative of curriculum and practice. That driving vision grows from knowledge of the learners' needs and a passion for the learning/content. The best teacher helps others to see and discuss the driving vision.

Fourth, Lounsbury demonstrated that he has an outstanding respect for all persons, colleagues, and students and he constantly sought ways to affirm others in an ongoing means. This was evident in the very nature of the way he greeted each custodial

worker, secretary, colleague and student as he lead the way across the GCSU campus. This was evident in the manner in which he treated this researcher from her first request for an interview to the way he emailed to encourage progress and ask if anything more is needed to finish the dissertation.

Fifth, his vision is for democratically based and developmentally appropriate education for young adolescents accessible to others. He demonstrated this in attempting to establish the Oak Hill School in his own home town.

Lounsbury promoted his beliefs through his encouragement of teachers to become writers as they discussed their vision with the wider audience of middle level teachers through the journal and later NMSA publications. He reinforced the knowledge and understanding of his vision to an audience of over a thousand recently in the William Alexander Memorial Lecture at the NMSA conference in Nashville, Tennessee (November 10, 2006). At the age of 82, John Lounsbury is still at the heart of the middle level movement.

APPENDICES

APPENDIX A

Participation Request Letter

*Sheila R. Gloer
1805 Plum Street
Waco, Texas 76706*

July 14, 2005

Dear _____:

Please allow me to introduce myself. I am a doctoral student at Baylor University in the School of Education. I am presently working on a dissertation which is an oral history of John H. Lounsbury. I also have a faculty position and a faculty fellowship from the Baylor University Institute for Oral History with which to complete this research. I have recently spent several days interviewing Dr. Lounsbury in Milledgeville, Georgia in his office. I know that the two of you worked together on _____ and would like to ask you a few questions. I would like to tape record our conversation which will then be transcribed and become the property of the Baylor Institute for Oral History. The purpose of this oral history will be to discover what prompted Lounsbury to advocate for reform and ultimately for the creation of a new model of education for young adolescents called the middle school. This study of John Lounsbury will focus on his rise to leadership in the movement and will establish a historical perspective for which to assess the present day middle school movement.

If you will agree to allow me to interview you over the phone, I will need you to sign a "Deed of Gift" agreement so that the tape recordings and transcriptions may be stored in the Oral History Archives. After completion of this project, a copy of all tapes and transcriptions will also be sent to the National Middle School Archives.

Please find enclosed a copy of the "Deed of Gift" agreement. If you would agree to allow me to interview you by means of recorded phone conversation, please sign the form and return it to me in the attached stamped envelope. When I have the signed agreement, I will contact you to arrange a suitable time for us to talk.

I look forward to hearing from you,

*Sheila R. Gloer
Sheila_Gloer@baylor.edu
(254)296-3368*

APPENDIX B

Baylor University University Institute for Oral History
Deed of Gift Agreement

The purpose of the Baylor University Institute for Oral History is to gather and preserve historical documents by means of the tape-recorded interview. Tape recordings and transcripts resulting from such interviews, collectively entitled oral memoirs, become part of the archives of The Texas Collection of Baylor University. Oral memoirs will be made available for historical and other academic research and for public dissemination.

Participation in the Institute's projects is entirely voluntary and may be withdrawn at any time. If you have any questions regarding your rights as a participant, or have other questions regarding this research, please contact the Baylor University Committee for Protection of Human Subjects in Research, Dr. Lee Nordt, Chair, Baylor University, One Bear Place #97344, Waco TX 76798-7344. Dr. Nordt may also be reached at (254)710-4288.

Either Part I or Part II of this document as agreed to by the interviewee will govern use of the materials generated from an oral interview.

PART I. INTERVIEWEE DEED OF GIFT—UNRESTRICTED

I have read the above and understand that the tape recordings and transcripts resulting from this oral interview or oral interview series will become part of the oral history archives of The Texas Collection at Baylor University, where they will be made available for historical and other academic research and for public dissemination.

1. I hereby give, grant, convey, and consign this oral memoir to Baylor University as a donation for such historical and scholarly purposes as they see fit, including but not limited to, the exclusive rights of reproduction, distribution, preparation of derivative works, public performance, and display.
2. I hereby transfer to Baylor University legal title and all literary property rights to my oral memoirs including copyright.

I herein warrant that I have not assigned or in any manner encumbered or impaired any of the aforementioned rights in my oral memoir.

Interviewee (signature)

Date _____

Name of Interviewee (typed or printed)

PART II. INTERVIEWEE DEED OF GIFT—WITH RESTRICTIONS

I have read the above and understand that the tape recordings and transcripts from this oral interview or oral interview series will become part of the oral history archives of The Texas Collection at Baylor University, where they will be made available for historical and other academic research and for public dissemination.

I herein warrant that I have not assigned or in any manner encumbered or impaired any of the aforementioned rights in my oral memoir.

1. I hereby give, grant, convey, and consign this oral memoir to Baylor University as a donation for such historical and scholarly purposes as they see fit, with only the following restrictions:

Nature of restrictions on use of transcripts (attach additional sheet if necessary):

Nature of restrictions on use of tape recordings (attach additional sheet if necessary):

2. I hereby transfer to Baylor University legal title and all literary property rights to my oral memoirs including copyright with only the following restrictions:

Nature of restrictions on use of transcripts (attach additional sheet if necessary):

Nature of restrictions on use of tape recordings (attach additional sheet if necessary):

Interviewee (signature)

Date _____

Name of Interviewee (typed or printed)

PART III. INTERVIEWER DEED OF GIFT

I will conduct the interview or series of interviews with _____ and have read the above. In view of the scholarly value of this research material, I voluntarily donate my portion of these oral memoirs to Baylor University and hereby transfer to Baylor University legal title and all literary property rights to the memoir including copyright.

Interviewer (signature)

Name of Interviewer (typed or printed)

Date _____

APPENDIX C

Additional Information Concerning Interview Process

The purpose of interviewing John Lounsbury is to gather insights from him concerning his career, his philosophy of middle level education, and to understand and record, from his viewpoint, the beginnings of the middle school movement. The interview process will be in two parts. A first visit with Dr. Lounsbury will be over three days, interviewing twice a day for no more than 90 minute sessions. On this first visit, one hour interview will also be devoted to Mrs. Lounsbury which will seek to gain information about Dr. Lounsbury's family life, just in the way that it pertains to his career and work ethic. One hour interview will also be conducted with Mary Mitchell, Dr. Lounsbury's assistant for 20 years. Other colleagues who agree to be tape recorded, will also sign the Deed of Gift form. These colleagues will be asked questions regarding Dr. Lounsbury's work, their association with him, and the early history of the middle school movement. The purpose in interviewing them will be to present the most complete and accurate picture of Dr. Lounsbury's work.

All interviewees will be given the opportunity to read the transcripts of the interview and to then decide whether they wish to grant final approval to use their name and statements in the oral history collection and storage. At any time if a participant wishes to stop the recording or to not answer a question, it is his/her right to do so. All participants when signing the Deed of Gift grant that their name will be associated with the recordings and written transcripts. No one is required to participate if s/he chooses not to participate.

All participants will be informed that the Institute for Oral History will retain final copyright of tapes and transcripts, however, that the researcher will be writing a dissertation from the collected material and will have the tapes and their transcripts sealed for 5 years following the completion of this project in order to have sole access to the material for future research and publication.

I, _____, have been informed of the nature and purpose of the research and interview process as listed in the paragraphs above. I will be given a copy of this agreement upon my signing.

_____ date signed

If you have any questions regarding your rights as a subject, or any other aspect of the research as it relates to your participation as a subject, please contact Baylor's University Committee for Protection of Human Subjects in Research. The chairman is Dr. Matthew S. Stanford, Department of Psychology and Neuroscience, One Bear Place #97334, Waco, Texas 76798-7334, phone number 254-710-2236.

APPENDIX D

Baylor University Oral History Guidelines

I. ETHICAL & LEGAL CONSIDERATIONS

A. Ethical Concerns

1. Each oral history interviewer should be committed to producing the highest-quality interview possible. The interviewer should realize that the life of the tape extends far beyond the immediate use and should strive to gather information that will be relevant to future users.
2. The interviewee should be informed of her/his rights and interests, the purposes of the program/project, interview and transcribing procedures, final location of tapes and transcripts, and potential use of the memoir.
3. Interviewers should guard against any possible exploitation of interviewees and be sensitive to ways in which interviews might be used.
4. Interviewers should be sensitive to the communities from which they have collected their oral histories, taking care not to reinforce thoughtless stereotypes or to bring undue notoriety to the communities. The resulting interviews should be made accessible to the communities.
5. Interviewees should be given the opportunity to respond to questions as freely as possible and not be subjected to stereotyped assumptions.
6. Interviewers should make every effort to place completed interviews in an archives or repository where they can be used by other interested researchers.

For additional ethical guidelines, see the latest edition of the **Oral History Evaluation Guidelines** from the Oral History Association.

B. Legal Concerns

1. Oral history interviews are subject to U.S. copyright law (1978).
2. For public use of tapes/transcripts, both the interviewee and the interviewer must give written permission.
3. Standardized release forms are useful; a general release and a separate form permitting restrictions or a time seal will be needed. You may adapt release forms from other projects or consult a lawyer and create your own form. The latter may be advisable if your project has any sensitive aspects.
4. Ideally, a general release should be signed before an interview series begins. Restrictions may be added by supplemental agreement.
5. Restricted oral memoirs should have specified opening dates. It is very difficult to enforce restrictions, for instance, that are linked to the duration of someone's lifetime.
6. Oral history interviews are subject to libel and slander law. The interviewer should be sensitive to possible violations of this law and be prepared to seal this portion of the tape or edit the transcript so that the name of the person being slandered is not made public.

For further information, see John A. Neuenschwander, *Oral History and the Law*, 3d ed. (2002). **Order online** from the Oral History Association.

http://www.baylor.edu/oral_history/index.php?id=24170

APPENDIX E

American Historical Association 1990 Recommendations for Oral History

Oral History Association (1990) *Oral History Evaluation Guidelines*. Retrieved from http://www.dickinson.edu/oha/pub_eg.html#Evaluation%20Guidelines%20Committees on May 18, 2006.

1. Interviews will be recorded on tape after the person to be interviewed has been informed of the mutual rights and responsibilities involved in oral history, such as editing, confidentiality, disposition, and dissemination of all forms of the record. Legal releases and agreements between the interviewer and interviewee will be documented.
2. The interviewer should strive to prompt informative dialogue through challenging and perceptive inquiry, should be grounded in the background and experiences of the person being interviewed, and, if possible, should review the sources relating to the interviewee before conducting the interview.
3. To the extent practical, interviewers should extend the inquiry beyond their immediate needs to make each interview as complete as possible for the benefit of others.
4. The interviewer should guard against possible social injury to or exploitation of interviewees and should conduct interviews with respect for human dignity.
5. Interviewers should be responsible for proper citation of oral history sources in creative works, including permanent location.
6. Interviewers should arrange to deposit their interviews in an archival repository that is capable of both preserving the interviews and making them available for general research. Additionally, the interviewer should work with the repository in determining the necessary legal arrangements.

APPENDIX F

Interview One Question Guide for John Lounsbury:

What do you remember about your family while you were growing up?

What do you remember about your family after you married?

What is your earliest memory of your own educational experience?

Which of your teachers were the formative influences on your life and why?

What if anything in your early education made a negative influence on you?

What specifically do you remember about your adolescent years?

APPENDIX G

Interview Two Question Guide for Dr. Lounsbury:

You helped to author the report by ASCD entitled *The Junior High School We Saw; One day in the Eighth grade*. You mentioned in the 1990 study that criticism about the Junior High School had been mounting for several years. Was this the reason for the study in 1962?

What were the precursors to this shadow study being undertaken?

What do you believe the group expected to find?

You have elsewhere stated that the findings of this study were "rather discouraging". Was the outcome what you personally expected?

Do you think the group in general were surprised by what they saw?

Following the 1964 study, you were involved with 4 more national shadow studies. Why did you feel it was important to undertake all 5 of these studies?

Other than grade level observed, what do you feel were similarities and differences of these studies?

Do you feel that if a researcher were to undertake a shadow study today, that the findings would be any different than the 1990 study or for that matter the 1964 study?

From the great list of your contemporaries, who would you say that you worked with the most?

Describe the early days of discussions concerning the middle level movement?

What was your association with Gordon Vars?

Did the two of you collaborate on any research?

What about James Beane?

Conrad Toepfer?

Donald Clark (Shadow Study 1990)?

Tell me about any other collaborative projects.

In May 1983 you wrote, "Shouldn't we close some doors?" In that article you suggested that there are some "musts" in a true middle school. Why did you suggest the "musts" as they appeared in that article?

What do you feel are the "musts" in an effective middle school today?

Tell me about the "experimental school" called Oak Hill that you helped to start. What were your specific objectives in forming this school?

What writing/book has been the most influential to your own life? and why?

APPENDIX H

Interview three question guide for Dr. Lounsbury:

Please tell me about the Georgia Lighthouse Schools and your role with this entity?

Your article entitled, "The middle school Curriculum--or Is It Curricula?" for NASSP (1991) suggests that you hoped for curricular attention rather than organizational attention in the last decade of that century. Now that the decade has passed, what would you say were the successes and failures of addressing the need for a developmentally appropriate curriculum for ML?

What would you say is the number one issue that future teachers must address in developing effective curriculum?

What would you say to principals today who are feeling the effects of the No Child Left Behind Act and who want to follow the middle school philosophy as stated in "This We Believe"?

What would you say to a class of pre-service middle level teachers if they sat here before you today?

APPENDIX I

Phone Interview participants:

Sherrel Bergman, author, professor and 1999 winner of the John Lounsbury Award;

Ed Brazee, professor, and current publications editor for NMSA;

Ross Burkhardt, consultant, co-authored *This We Believe: Developmentally Responsive Middle Level Schools*, the National Middle School Association's fundamental position paper, President of NMSA in 1996-97, and in 1998 he was inducted into the National Teachers Hall of Fame;

Tom Gatewood, president of NMSA in 1975-1976, first editor of the *Middle School Journal*, professor, retired;

Ken McEwin, author, professor, president of the NMSA in 1982-1983, the author of over 125 publications on middle school education and a recipient of NMSA Distinguished Service Award;

Nancy Mizelle, author, professor at the John Lounsbury School of Education and long-time colleague of Lounsbury, Research in Middle Level Education SIG ;
Marion Payne, Partnership consultant, president of NMSA 1998-1999, principal, State Department of Education Middle School Specialist, former Director Oak Hill Middle School Complex, Milledgeville, Georgia;

David Puckett, middle school teacher and author, Kentucky Middle School Association's Teaming Award, regional director of the association;

Tom Rogers, retired professor Cornell, life-long friend of Lounsbury;

Fran Salyers, Center for Middle School Academic Achievement, NMSA president 1999-2000, Kentucky Middle School Association;

Mark Springer, author of *Alpha* and *Soundings* integrated curriculum, and others;

John Swaim, NMSA president in 1979-1980, professor author, and co-founder of the Colorado Association of Middle Level Educators;

Conrad Toepfer, author, professor, NMSA president 1987-1988, know as one of the founders of the middle school philosophy;

Gordon Vars, executive secretary for the National Association for Core Curriculum, co-author with Lounsbury in Junior High Reform articles and books, co-authored *This We Believe: Developmentally Responsive Middle Level Schools*, NMSA's fundamental position paper, first president of NMSA in 1971-1972.

APPENDIX J

Phone interview guide:

This is (date and time) and I am Sheila Gloer talking with _____ concerning his/her knowledge of John Lounsbury and the middle school movement. I am tape-recording as we speak for a project with the Baylor University Institute of Oral History. Hello, _____. (check voice meter)

1. First I would like to talk with you about some background information and then I will be asking 4 questions that I have asked everyone whom I interviewed.
2. What was your connection, if any, to the middle school movement and how did you become involved with advocating/teaching/and writing about young adolescents?
3. How did you come to know John Lounsbury? And if you remember your first meeting, tell me as many details as you can remember about that event, please.
4. Were there any particular characteristics by which you most remember Dr. Lounsbury, which are pertinent to his career or success?
5. What knowledge do you have of his personal research and were you involved in the Shadow Studies?
6. What was the nature of collaboration between the two of you? Describe the way in which you worked together and describe any anecdotes concerning this collaboration?

Next I want to ask you the 4 standard questions that I have asked everyone:

1. What do you think led Dr. Lounsbury and others like yourself, to develop and promote the middle school philosophy?
2. What factors present in the 1950s and 1960s necessitated reform for the education of young adolescents? Are any of these same factors present today?
3. What are the most essential elements for successful education of the middle level student as you see it?

4. What is the future of the middle school movement in your opinion? What about the National middle level organization?

And now for just a few more follow-up questions concerning Dr. Lounsbury?

1. What if anything, do you remember about the early days of the middle school movement? Early gatherings, moments of “getting started”?
2. What were some of the most difficult early challenges of the movement?
3. What is it that characterizes John Lounsbury as one of the “founders of the movement”?
4. Some have suggested that as editor to NMSA journal and subsequent publications, John possessed a great deal of power to sway the direction that the movement would take. Would you agree? why or why not?
5. What do you remember most about working on texts with John?
6. What are his greatest skills that allow him to remain important to the movement after all of these years?
7. The National Middle School Association has named its most prestigious award after Dr. Lounsbury. Why do you think that was done?

Thank you for your time and open insights into the nature of Dr. Lounsbury. I appreciate your willingness to talk with me. Good afternoon.

APPENDIX K

Second Visit July 5th, 2006—Lounsbury question guide

Four Research Questions:

1. What led you and others like yourself, to develop and promote the middle school philosophy?
2. What factors present in the 1950s and 1960s necessitated reform for the education of young adolescents? Are any of these same factors present today?
3. What are the most essential elements for successful education of the middle level student as you see it?
4. What is the future of the middle school movement in your opinion? What about the National middle level organization?

APPENDIX L

July 6th, 2006 Second visit –Lounsbury question guide

Please tell me about your work as editor of the *Middle School Journal*.

Were articles for the journal peer reviewed and were they always?

What were layout procedures?

How were articles solicited?

Talk about how you were able to mentor young writers.

What was the circulation rate of the Journal?

How was the financing for the journal handled?

Were there monthly features in the journal?

Were there particular authors which you “discovered”?

Education Press Association pronounced you as having a “stalwart, professional publication. Have there been any particular awards or other accolades which the journal has received?

How did NMSA select an editor for the journal when you decided to “retire” to work on just the monographs?

How did the idea come to publish the first book?

What were some of your favorite book projects to on which you worked?

Talk about the *This We Believe* projects, please.

How did you learn the skills of both editing and writing?

APPENDIX M

JOHN H. LOUNSBURY AWARD WINNERS

2003 – J. Howard Johnston

2002 - Chris Stevenson

2001 - Nancy Doda

1999 - Sherrel Bergmann

1998 - Paul S. George

1997 - James Beane

1995 - John H. Swaim

1993 - Joan S Lipsitz

1991 - James Garvin

1990 - George Melton

1989 - C. Kenneth McEwin

1987 - Gordon Vars

1985 - Conrad F. Toepfer

1983 - Don Eichhorn

1981 - William Alexander

1978 - John H. Lounsbury

APPENDIX N

John H. Lounsbury Publications

Articles, Columns, and Essays

The World Is Growing Larger (1954), *Peabody Journal of Education*

Professor Grey and Group Work (1956, January), *Progressive Education*

What Has Happened to the Junior High School? (1956, March), *Educational Leadership*

Meet Junior (1957, December), *NEA Journal* (Reprinted in *Readings in Curriculum*),
with William Van Til

Asia, the Sleeping Giant Awakens (1958, February), *Trends*, News Bulletin of the
Florida Council for the Social Studies

What Keeps Junior From Growing Up? (1960, January), *The Clearing House*

Junior High School Education: Renaissance and Reformation (1960, January), *The High School Journal*

How the Junior High School Came to Be (1960, December), *Educational Leadership*
(also *Education Digest* (March, 1961) and others. Reprinted in *Readings in American Education*, *Secondary Education: Origins and Directions*, and *Readings in the Foundations of Education*.)

High School and Junior High School (1960s) contributions to *American Educator Encyclopedia*, The United Educations, Inc., Lake Bluff, IL

What—No Grades? (1961, September), *Georgia Education Journal*

Junior Deserves A Better Break (1962, February), *Georgia Education Journal*

So Far, So Good: The Junior High School Story (1962, November), *Teachers College Record*

News and Views on Education, a weekly column in the *Baldwin News and Union Recorder* (1963-1965), Milledgeville, Georgia

- Recent Trends in Junior High School Practices: 1954-1964 (1965, September), *NASSP Bulletin*, with Harl R. Douglass
- Helping Participants to Participate (1965, Nov-Dec), *DIMENSIONS in Christian Education*
- Desired and Available Social Studies Materials (1966, January), *Georgia Education Journal*
- How To Ask Questions (1966, Mar-Apr), *DIMENSIONS in Christian Education*
- A Decade of Changes in Junior High Practices (1966, April), *The Clearing House*, with Harl R. Douglass
- School Organizational Patterns in Georgia (1968, October), *Georgia Education Journal*
- The Middle School: Fresh Start or New Delusion (1971, November), *The National Elementary Principal*, with Gordon F. Vars
- Changing Face of School Organizational Patterns in Georgia (1973, May), *Georgia Educator*
- Some Unsophisticated Lessons on Learning (1976, Vol IV), *Transescence*
- The Curriculum is a Three Letter Word (1976, March), *Middle School Journal*
- It's High Time (1976, June), *Middle School Journal*
- But George Isn't a Teacher (1976, September), *Middle School Journal*
- Zero Based Curriculum Development (1976, December), *Middle School Journal*
- Repotting People (1977, February), *Middle School Journal*
- Progressive Education, Back to the Basics, and the Middle School (1977, Spring), *Junior High/Middle School Bulletin*
- Serving Two Masters (1977, May), *Middle School Journal*
- The World Is Growing Larger (1977, August), *Middle School Journal*
- Teaching: Building or Growing (1977, November), *Middle School Journal*
- Is There Something More Basic Than the Basics? (1978, February), *Middle School Journal*

The Psychological Side of Curriculum Change (1978, March), *High School Journal*
Reprinted in *Education Digest* (November, 1978) with Alfred A. Arth and Carol Baribeau.

On Living in Adverse Times (1978, November), *Middle School Journal*

To Be Taught, or To Learn? (1978, August), *Middle School Journal*

Kudos to CBS, and Reflections on Education (1978 December), *The High School Journal*

On Encouraging Dreams (1979, February), *Middle School Journal*

The Third Cheek (1979, May), *Middle School Journal*

What Comes First—Will Or Way? (1979, August), *Middle School Journal*

On Questions and Answers (1979, November), *Middle School Journal*

The Pause That Refreshes (1980, February), *Middle School Journal*

Thanks, We Needed That (1980, May), *Middle School Journal*

Unlearning In Order To Learn (1980, August), *Middle School Journal*

The Real Problem (1980, November), *Middle School Journal*

Less Is More in Middle School Scheduling (1981, January), *Principal*, National Association of Elementary School Principals.

Reflections of William Alexander (1981, February), *Middle School Journal*

The Middle School: A National Perspective (1981, Winter), *Colorado Journal of Educational Research*, Vol 20, No. 2

It's A Natural (1981, November), *Middle School Journal*

A Partial Panacea (1981, August), *Middle School Journal*

America and Her Public Schools (1981, May), *Middle School Journal*

Is Your School Too Small? (1981, February), *Middle School Journal*

Middle Level Social Studies: Points To Ponder (1981, February), *Social Education* , NCSS

- Staying On Track (1982, February), *Middle School Journal*
- Shaking the Tree of Knowledge (1982, May), *Middle School Journal*
- Guilty As Charged (1982, August), *Middle School Journal*
- More Eggs in Fewer Baskets (1982, November), *Middle School Journal*
- Developing Effective Middle Level Schools — It's The Principal of the Thing (1983, May), *NASSP Bulletin*
- What To Do in Teacher Education While We Wait for the Revolution (1983, Winter), *The Journal of the Georgia Association of Teacher Educators*
- It's Past Time (1983, February), *Middle School Journal*
- Indoctrination Is Not A Dirty Word (1983, November), *Middle School Journal*
- Reflections on 'A Nation At Risk' (1983, August), *Middle School Journal*
- Shouldn't We Shut Some Doors? (1983, May), *Middle School Journal*
- Middle School Education's Priorities for Progress (1983, December), *Newsletter, California League of Middle Schools, Vol 3, No. 2*
- If Good Men Do Nothing (1984, February), *Middle School Journal*
- Put It In Writing (1984, May), *Middle School Journal*
- The Most Neglected Basic (1984, August), *Middle School Journal*
- The Overlooked Key to School Improvement (1984, November), *Middle School Journal*
- Junior High School Education: Positive Perspectives (1984, February), *Schools in the Middle*, NASSP
- It's Past Time (1985) *Middle School: A Learning Place* (Maryland Middle School Association Journal)
- Thoughts On Launching the OMEA Yearbook (1985), *Oklahoma Middle Level Education Association Yearbook 1985-86*
- Caution — Danger Ahead (1985, February), *Middle School Journal*

- It's Up To Us (1985, May), *Middle School Journal*
- New School Year's Resolutions (1985, August), *Middle School Journal*
- Do Your Own Work? (1985, November), *Middle School Journal*
- An Open Letter to Administrators and Board Members (1986, February), *Middle School Journal*
- Attitude Adjustment (1986, May), *Middle School Journal*
- The Challenge of New Realities (1986, August), *Middle School Journal*
- Editorial for special issue on middle level education (1986, September), *Clearing House*, with Conrad F. Toepfer, Alfred A. Arth, and J. Howard Johnston
- Parental Involvement: Why and How? (1986, October/November), *Action Sheets*, National Resource Center for Middle Grades Education
- How To Improve Written Communications with the Public (1987, January/February), *Action Sheets*, National Resource Center for Middle Grades Education,
- Moving the School in the Middle From the Bottom to the Top (1987, February), *Middle School Journal*
- Building the Foundation for Positive School-Community Relations (1987, March/April), *Action Sheets*, National Resource Center for Middle Grades Education
- Wayside Teaching (1987, May), *Middle School Journal*
- What Values Are We Teaching, Should We Teach, at the Middle Level? (1987, May), *Schools in the Middle*, NASSP
- Extending and Deepening the School-Community Relationship (1987, May/June), *Action Sheets*, National Resource Center for Middle Grades Education
- Can We "Fix" the Schools? (1987, August), *Middle School Journal*
- Why I Believe Middle School Is Better (1987, September), *American School Board Journal*
- Pogo Revisited (1987, November), *Middle School Journal*
- Excellence and Acne (1988, January), *T.E.A.M.—The Early Adolescence Magazine*

On Assumptions, Brains, and Rubber Bands (1988, February), *Middle School Journal*

A Pat on the Back (1988, May), *Middle School Journal*

Call the Psychiatrist! (1988, July), *Middle School Journal*

Perspectives on Middle Level Education in Georgia (1988, Fall), *Becoming*, Georgia Middle School Association

Just What Should Every Early Adolescent Know? (1989, January), *Middle School Journal*

Middle School Social Studies (1989, February), *Dissemination Services*, National Council for the Social Studies

Homework — Is A New Direction Needed? (1989, March), *Middle School Journal*

An Assignment for the Summer (1989, May), *Middle School Journal*

Strike While the Iron Is Hot (1989, November), *Middle School Journal*

The School As Teacher (1990, January), *Middle School Journal*

Middle Level Education: Progress, Problems, & Prospects (1990, Winter), *Educational Horizons*

Interdisciplinary Teaming—Destination or Way Station? (1990, March), *Middle School Journal*

The Middle School: The Exploratory School (1990, Summer), *TAMS Journal*

Once Around The Elephant (1990, May), *Schools in the Middle*, NASSP

Restructuring Middle Schools: Two for the Money (1991, February), *Wingspan*

What Needs Restructuring? (1991, May), *Becoming*, MAMLE

An Interview with John Lounsbury (by F. Winstead), Fall, 1991, *SACS News*

A Fresh Start for the Middle School Curriculum (1991, November), *Middle School Journal*

Thoughts On Launching the Journal, (1991, December), *ELMLE Journal*

Music: Universal Language—Universal Curriculum (1992, February), *Music Educators Journal*

- Opportunity Is Knocking—Are We Ready? (1992, Winter), *MidSports*, NMSAA
- Teacher Certification and Middle Level Education, *Current Issues in Middle Level Education* (Spring, 1992), West Georgia College.
- Life in the Eighth Grade (1992, March), *CLMLE Journal*, with Donald Clark
- An Open Challenge (Spring, 1993), *Texas Study of Secondary Education*
- The Challenge of Restructuring Middle Level Education (Winter, 1993), *Contemporary Education*
- Beyond the Interdisciplinary Team (Spring 1994), *Becoming: GMSA Journal*
- Please, Not Another Program! (March/April 1996), *The Clearing House*
- Curriculum Integration: Problems and Prospects (November 1996), *Middle School Journal*
- Key Characteristics of Middle Level Schools (November 1996), *ERIC Digest*, EDD-PS-96-13
- Personalizing the High School: Lessons Learned in the Middle (December 1996), *NASSP Bulletin*
- Professional Literature: Low Cost, Local Staff Development (Winter 1997), *Ohio Middle School Association Journal*
- An Interview with Dr. John H. Lounsbury (by Lee Manning) (1997 Annual Theme Issue), *Childhood Education*
- Viewpoint (Summer 2003) *National Dropout Prevention Center Newsletter*.
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- Assuring the Continued Success of the Middle School , *A Look Ahead* (1977), Paul George, Editor, NMSA.
- A Rationale for Middle School Scheduling, *The Middle School Primer* (1981), University of Wyoming Bookstore.
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- The Middle School Curriculum — or Is It Curricula? in *Middle Level Programs, Policies, & Practices*. (1992), Jody Capelluti and Donald Stokes (Eds.), NASSP.
- The School Is a Teacher, *The Education of Early Adolescents: Home Economics in the Middle School*, 1994 Yearbook, American Home Economics Association.
- Building for the Future, Not the Past: The Oak Hill Story, *Transforming Ourselves, Transforming Schools: Middle School Change* (2002). Nancy Doda and Sue Thompson, editors. NMSA.
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- Middle Level Education: A Personal History, *Encyclopedia of Middle Level Education* (2005), with Gordon Vars. Vincent Anfara, P. Gayle Andrews, and Steve Mertens, editors. Information Age Publishing.
- In Perspective—After 32 years of Advocacy, What Have We Learned? *This We Believe in Action* (2005), Thomas O. Erb, editor. National Middle School Association.

Books, Monographs, and Research Reports

- Modern Education for the Junior High School Years*, Second Ed. (1967), with William Van Til and Gordon F. Vars, Bobbs-Merrill (first edition 1960).
- A Curriculum for the Middle School Years* (1978), with Gordon F. Vars, Harper & Row.
- The Junior High School We Saw: One Day in the Eighth Grade* (1964), with Jean Victoria Marani, ASCD.

The Middle School In Profile, A Day in the Seventh Grade (1980), with Jean V. Marani and Mary F. Compton, NMSA.

Middle School Education: As I See It (1984), NMSA.

How Fares the Ninth Grade? (1985), with J. Howard Johnston, NASSP.

An Agenda for Excellence at the Middle Level, with J. Howard Johnston, Alfred A. Arth, and Conrad Toepfer (1985), NASSP.

Developing a Mission Statement for the Middle Level School, with J. Howard Johnston, Alfred A. Arth, and Conrad Toepfer (1987), NASSP.

Life In The Three Sixth Grades (1988), with J. Howard Johnston, NASSP.

Assessing Excellence: A Guide for Studying the Middle Level School, with J. Howard Johnston, Alfred A. Arth, Sherrell Bergmann, and Conrad Toepfer (1988), National Association of Secondary School Principals.

Middle Level Education's Responsibility for Intellectual Development, with Conrad Toepfer, Alfred A. Arth, Sherrell Bergmann, J. Howard Johnston, and Donald Clark (1989), NASSP.

Inside Grade Eight: From Apathy to Excitement (1990), with Donald Clark, NASSP.

As I See It (1991), NMSA.

Treasure Chest: A Teacher-Advisory Source Book (1991), with Cheryl Hoversten and Nancy Doda, NMSA.

Connecting the Curriculum Through Interdisciplinary Instruction, Ed. (1992) NMSA.

Linking Services for Georgia's Young Adolescents. Ed. (1993) Georgia Department of Education.

Middle Level Teachers: Portraits of Excellence, (1995) NMSA (with Arth, McEwin and Swaim).

Curriculum Integration: Twenty Questions—With Answers (1990), with Gert Nesin. Georgia Middle School Association.

Making Big Schools Feel Small: Multiage Grouping, Looping, and Schools-Within-A School (2000), with Paul George. NMSA.

Revitalizing Teaming to Improve Student Learning, Professional Development Kit (2001), with Sandra Schurr. NMSA.

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Reading and the Middle School Student: Strategies to Enhance Literacy (1990), Judith Irvin. Allyn and Bacon.

Teaching Ten to Fourteen Year Olds (1992, Second Edition 1997), Chris Stevenson. Longman.

Restructuring the Middle Level School: Implications for School Leaders (1994), Sally N. Clark and Donald C. Clark. SUNY Albany Press.

Beyond Separate Subjects: Integrative Learning at the Middle Level (1995), Yvonne Siu-Runyan and C. Victoria Faircloth. Christopher Gordon Publishers.

Foreword for *Strategies for Adolescence: Turning It Around for Middle School Students* (2004), Connie Tait. National Dropout Prevention Center, Clemson University.

In addition I have written Forewords for over 30 NMSA books.

Editor

The Middle School Primer (1981), University of Wyoming.

Dynamics of an Empowered School: Getting to the Core (1993), Joseph W. Hoff Publications.

Teaching at the Middle Level: A Professional Handbook (1995), D.C. Heath and Company.

Also served as editor for over 150 publications produced by NMSA.

Appendix O

Comparison of Lounsbury's Junior High standards, Turning Points, and This We Believe

Junior high standards for 1960s	Turning Points 2000 Design Elements	This We Believe
<p>1) The plant, equipment, and supplies for the educational program of the junior high school years must be adequate for the task, and designed in terms of the . . .needs of young adolescents.</p> <p>2) The junior high school should be staffed with dedicated and highly qualified men and women especially trained for work with young adolescents.</p> <p>3) Scheduling and administrative routines should be adaptable and flexible.</p> <p>4) Junior high school educators in the 1960s should constantly strive to be on the growing edge of the profession.</p> <p>5) Students should have opportunities to come to grips with pressing social realities of the times.</p> <p>6) Students should receive help in meeting their personal-social needs.</p> <p>10) Students should acquire the social understandings, competencies, and attitudes essential for democratic citizenship.</p> <p>7) Students should be helped to understand and practice democratic values, including reliance upon the method of intelligence.</p> <p>8) Students at all levels should participate in a structured core program which deals with significant centers of experience or problem areas. Block-time scheduling represents a major step toward this goal. 9) Students should master the English fundamentals through abundant opportunities to read, speak, and write on meaningful topics.</p> <p>11) Students should acquire the mathematical understandings and competencies essential for intelligent citizenship.</p> <p>12) Students should acquire a basic understanding of the natural world and of modern scientific technology.</p> <p>13) Students should have many creative experiences with arts and</p>	<p>5) Staff middle grades schools with teachers who are expert at teaching young adolescents, and engage teachers in ongoing professional development</p> <p>3) Organize relationships for learning</p> <p>1) Teach a curriculum grounded in standards, relevant to adolescents' concerns, and based on how students learn best; and use a mix of assessment methods</p> <p>2) Use instructional methods that prepare all students to achieve high standards</p>	<p>10) Educators committed to young adolescents</p> <p>6) Comprehensive guidance and support services</p> <p>4) Flexible organizational structures</p> <p>4) Flexible organizational structures</p> <p>5) An adult advocate for every student</p> <p>6) Comprehensive guidance and support services</p> <p>1) Curriculum that is challenging, integrative, and exploratory</p> <p>3) Varied teaching and learning approaches</p> <p>4) Flexible organizational structures</p>

crafts, literature, creative writing, homemaking, industrial arts, and music.

15) Students should have access to a variety of elective courses which are appropriate to the needs of young adolescents

16) Students should have access to a rich variety of co-curricular activities

18) Individual abilities, needs, and achievement should be determined by a carefully planned and coordinated program of testing and evaluation

20) Students should be taught through a wide variety of teaching methods and instruction materials

14) Students should participate in a comprehensive health and physical education program

6) Provide a safe and healthy school environment

11) Programs and policies that foster health, wellness, and safety

17) A full range of guidance services should be available to every student

6) Provide a safe and healthy school environment

11) Programs and policies that foster health, wellness, and safety
12. Family and community partnerships

19) Students should have access to remedial help in the basic skills

6) Provide a safe and healthy school environment

12. Family and community partnerships

7. Involve parents and communities in supporting student learning and healthy development

12. Family and community partnerships

21) Promotion and assignment of students to class sections should be based on careful consideration of all pertinent factors in the situation

7. Involve parents and communities in supporting student learning and healthy development

12. Family and community partnerships

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