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March is unpredictable—a month of contrasts and contradictions. In the Northern Hemisphere, March marks the end of winter and the onset of spring, when Old Man Winter reluctantly loosens his grip on the earth so Mother Nature can call forth the first signs of spring. March weather is fickle; it “comes in like a lion and goes out like a lamb.” Of course the most unpredictable event in March is the NCAA Division I basketball tournament, also known as March Madness. The tournament always has upsets, suspenseful finishes, and lots of drama.

As I was preparing my column for this issue, I told a colleague that I thought daily life in a middle school in springtime has all the drama, unpredictability, and “madness” of the NCAA Division I basketball tournament. March is a hectic month in middle schools, with teachers and principals looking ahead to end-of-year testing and the start of the last nine weeks of school, and students looking ahead to spring break and summer vacation. As the weather gets nicer and the days get longer, the kids grow tired of being in school and being inside. Teachers have likely exhausted all of their “tricks of the trade”—the tricks that were novel in November are mundane in March.

My colleague halfheartedly agreed. “Yeaaaah, but you could say that about any month in a middle school. What about the madness of September, or February, or May?”

His point was well taken. Daily life in middle schools is characterized by unpredictability and uncertainty, reflecting the dramatic and, often, irregular physiological, psychological, and social changes students undergo during this level of schooling. Providing “developmentally appropriate” educational programs for hundreds of young people who come from diverse backgrounds, have a wide range of skills and interests, and are developing at different rates is a challenging—if not daunting—responsibility.

NMSA’s position statement, *This We Believe: Keys to Educating Young Adolescents*, provides guidance for creating developmentally appropriate school programs for young adolescents. The articles in the current issue of *Middle School Journal* further illuminate and extend our understanding of the 16 characteristics of successful middle grades education discussed in *This We Believe*.

Beaty-O’Ferrall, Green, and Hanna integrate ideas from education, counseling, and psychotherapy to explain how teachers can improve classroom management, particularly with difficult students, by focusing on building and deepening personal relationships with students. Similarly, Dooner and her coauthors discuss how teachers can improve learning relationships in the classroom by exercising pedagogical and social authority in a balanced way.

Thornton presents a convincing argument for cultivating teacher leadership in middle grades schools, and she describes ways to empower teachers at the grassroots level to become leaders. Deering, Zuercher, and Apisa describe a master’s degree program at the University of Hawai‘i that models the tenets of *This We Believe* and features middle level organizational structures.

Powell and Seed draw examples from their years of experience in middle grades mathematics classrooms to suggest ways teachers can develop a caring ethic in their classrooms. Finally, Thompson and her coauthors recommend ways to implement service-learning projects that help connect schools with families and communities in meaningful ways.

A principal recently said to me, “In middle school, you have to expect the unexpected.” Indeed, young adolescents may change like the March weather; lions one day (or minute), and lambs the next. When schools ground their programs, practices, and organizational structures in *This We Believe* principles, they help bring stability, consistency, and sanity to a transitional period of life and schooling that can be maddening for many students (and teachers).
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Classroom Management Strategies for Difficult Students: Promoting Change through Relationships

Mary Ellen Beaty-O’Ferrall, Alan Green & Fred Hanna

Teachers in middle level schools face overwhelming demands and challenges in their classrooms. They are expected to know content and pedagogy, develop engaging lessons that meet the needs of diverse learners, and use a variety of instructional strategies that will boost student achievement while they simultaneously develop positive relationships with, on average, 125 students each day who are experiencing the personal, social, and cognitive challenges and opportunities of early adolescence (Carnegie Council on Adolescent Development, 1995; Schmakel, 2008).

Teaching is complex and cannot be reduced to discrete tasks that can be mastered one at a time. Teachers must “win their students’ hearts while getting inside their students’ heads” (Wolk, 2003, p. 14). As Haberman (1995) suggested, this winning of the hearts occurs through very personal interactions, one student at a time. This perspective is supported by research suggesting that teachers who develop such relationships experience fewer classroom behavior problems and better academic performance (Decker, Dona, & Christenson, 2007; Marzano, Marzano, & Pickering, 2003).

How can teachers engage students through enhanced personal interactions while simultaneously managing classroom climate and instruction? The purpose of this article is to suggest specific strategies that integrate knowledge and skills from education, counseling, and psychotherapy to help teachers develop a strong management system based on the development of personal relationships with students. These techniques are specifically adapted for use by teachers and more clearly delineate the nature of developing relationships and deepening them for the purpose of making education more effective.

Classroom management and relationship building

Research indicates that teachers’ actions in their classrooms have twice as much impact on student achievement as assessment policies, community involvement, or staff collegiality; and a large part of teachers’ actions involves the management of the classroom (Marzano, 2003; Marzano & Marzano, 2003). Classroom management is critically important in the middle grades years when students are more likely to experience declines in academic motivation and self-esteem (Anderman, Maehr, & Midgley, 1999).

Research indicates that these declines can be linked
to the classroom, and particularly to teacher-student relationships (Furrer & Skinner, 2003). When surveyed about their goals, adolescents have claimed that academics and the completion of their education are important to them. However, repeated studies of sixth through ninth graders have shown interest in academics, motivation for academics, and academic achievement levels decline dramatically during early adolescence, and especially during seventh grade (Carnegie Council on Adolescent Development, 1995).

One of the keys to effective classroom management is the development of a quality relationship between the teacher and the students in the classroom. Marzano, Marzano, and Pickering (2003), in a meta-analysis of more than 100 studies, reported that teachers who had high-quality relationships with students had 31% fewer discipline problems, rule violations, and other related problems over a year’s time than did teachers who did not. This significant statistic justifies further investigation into developing relationships.

A critical component of developing relationships is knowing and understanding the learner. Teachers must take steps to learn and understand the unique qualities of middle grades students, who are at a crucial time in their development. Although they are good at disguising their feelings, they have been described as actually craving positive social interaction with peers and adults; limits on behavior and attitudes; meaningful participation in families, school, and community; and opportunities for self-definition (Wormeli, 2003). Teaching middle grades students is unique in its demand for unconventional thinking; therefore, middle grades teachers must be willing to break the rules and transcend convention. The strategies that will be described for dealing with the most difficult of students are in many ways just that—unconventional.

Teachers who adopt a relationship-building approach to classroom management by focusing on developing the whole person are more likely to help students develop positive, socially-appropriate behaviors. The characteristics of effective teacher-student relationships are not related to the teacher’s personality or whether the teacher is well liked by the students. Instead, the relationships are characterized by specific behaviors, strategies, and fundamental attitudes demonstrated by the teacher (Bender, 2003). This approach involves taking personal interest in students; establishing clear learning goals; and modeling assertive, equitable, and positive behaviors (Hall & Hall, 2003; Rogers & Renard, 1999).

Research indicates that the most effective classroom managers do not treat all students the same. Effective managers employed different strategies with different types of students (Brophy, 1996; Brophy & McCaslin, 1992). Teachers with effective classroom management skills are aware of high needs students and have a repertoire of specific techniques for meeting some of their needs (Marzano & Marzano, 2003).

Adelman and Taylor (2002) reported that 12% to 22% of all students in schools suffer from mental, emotional, and behavioral disorders, and relatively few receive mental health services. The Association of School Counselors noted that close to one in five students has special needs and requires extraordinary interventions and treatments beyond the typical resources available to classroom teachers (Dunn & Baker, 2002). It is often these very students who create the most daunting challenges for teachers.

**Strategies for building relationships**

According to Wolk (2003), “Teacher-student relationships permeate the classroom, with relationships both helping and hindering learning and affecting everything from curriculum to choice of teaching methods.” Wolk asserted that for most teachers, “their relationships are their teaching” (p. 14). Current literature on building relationships as a means to manage classrooms includes recommendations such as using gentle interventions, finding time for bonding, avoiding punishments, and building activities that ensure success for all students (Hall & Hall, 2003).

These strategies, though helpful, may still leave teachers struggling with the most difficult students. Ideas from the fields of counseling and psychotherapy can be applied to these classroom struggles. Rogers and Renard (1999) asserted that we need to understand the needs and beliefs of our students as they are—not as we think they ought to be” (p. 34). What follows are specific strategies from the fields of counseling and psychology that teachers can apply in classroom settings when dealing with difficult students. The strategies of empathy, admiring negative attitudes, leaving the ego at the door, and multicultural connections will be explored.
Building empathy

Probably the most important aspect of a positive helping relationship is empathy on the part of the helper (Garfield, 1994; Goldfried, Greenberg, & Marmar, 1990; Luborsky, Crits-Christoph, Mintz, & Auerbach, 1988; Orlinsky, Grawe, & Parks, 1994; Sexton & Whiston, 1994). In actual practice, empathy on the part of the teacher results in the student feeling understood. Empathetic relationships are especially important for difficult adolescents (Bernstein, 1996; Mordock, 1991). Unfortunately in education, empathy is a concept largely misunderstood and even trivialized as a form of affection or caring. To the contrary, caring and empathy are not at all the same. Adler (1956) defined empathy as "seeing with the eyes of another, hearing with the ears of another, and feeling with heart of another" (p. 135). The end result of having been shown empathy is that the person “feels understood.” This is crucial to reaching and relating to young adolescents (Hanna, Hanna, & Keys, 1999).

Many teachers simply assume they understand the student’s problems and dilemmas, and mistakenly try to communicate their understanding in ways that only distance the student. For example, a female middle grades student once told a disappointed teacher that things were really hard at home and studying was difficult. The teacher responded by saying, “Well, you have to get past it and study anyway. I have been teaching for a long time, and there isn’t any excuse I haven’t heard.” The student, of course, had no indication that the teacher understood at all and was actually discouraged by the teacher’s unempathetic response. If this teacher had taken the time to show that she understood the student’s dilemma, she would have learned that the parents of the student were verbally fighting with each other every day, threatening each other with divorce, and arguing over custody of the children. They also fought about the father’s drinking. The teacher could have easily encouraged the student with an empathetic response such as, “It must be really difficult trying to study while listening to your parents fighting and wondering what is going to happen with your family.” Such a response would have communicated understanding to the student that she would have found valuable and that would have enhanced the level of respect she had for the teacher. Such a response also would have encouraged the student to communicate with the teacher so that the teacher and student could brainstorm ways to keep the student on task with her various assignments.

Admiring negative attitudes and behaviors

At first glance, this approach would seem to violate all that we know about behavior modification, but it is based on a well established area of research called “positive psychology” (Seligman, 1999). This approach looks upon negative student behavior as a skill he or she has been practicing and refining for many years. Most of these skills have their beginning in the student’s family life. In the case of a manipulative female teen, for example, being manipulative might have been the only or best way of getting her needs met in her family. It is to be entirely expected that she would bring these same skills to school in an effort to meet her needs there as well. Rather than engage in a power struggle with such a student, a teacher should acknowledge the skill that the student has worked so hard to develop—and then redirect it. Give her credit for all of the years she has practiced the skill. This will also lead to an increase in the student’s perceived empathy from the teacher. After acknowledging the skill, reframe the skill and then redirect it. It is important that this skill be applied with sincerity. Any hint of sarcasm could lead to further alienation between the student and the teacher.
Let us extend the example of a manipulative, young adolescent girl. She is engaged in a behavior that, in all likelihood, annoys both adults and her peers. However, there is a skill that may be present in the girl that can be reframed as the “ability to influence people.” Rather than address the girl’s manipulations as such, mention to her, “I have noticed that you have the ability to influence people, is that true?” She will probably reply with something like, “What do you mean?” The teacher can respond by saying, “Well, I have noticed that you can get people to do what you want them to do. Am I wrong?” It would help if the teacher used specific examples. At this point, the student will likely look at the teacher somewhat suspiciously and smile, saying, “Well that’s true sometimes, I guess.” The teacher can then respond, saying, “You have a valuable skill there. If you used it in other ways, you may find more successful ways of getting your needs met. This skill could be valuable in certain careers, such as corporate management, sales, or even counseling.” The young adolescent is usually quite surprised to hear something that she has previously been criticized for now being admired and looked upon as something potentially valuable.

Another example of the application of this approach would be the case of a young adolescent who consistently displays the infamous “bad attitude.” Quite at variance with the usual characterization of the bad attitude, we look at it as a skill that is often practiced and has a particular goal. The goal is to display and announce defiance and, to a certain degree, independence. Instead of fighting the attitude, punishing it, or even ridiculing it, try admiring it, putting aside any disgust or exasperation. “Wow,” the teacher might say, “You sure do have an impressive attitude. It is very well constructed, and I can tell you have been working on it for years.” One’s first thought on reading this might be to conclude that such an approach is simply crazy. However, a large percentage of young adolescents respond to this tactic with a smile and a greater willingness to continue the discussion. Admiration is extremely rare in the lives of young adolescents, and we dare say, much rarer than love. To receive it from an adult is precious indeed, and it often inspires immediate loyalty and respect toward a teacher. When communicated genuinely and honestly, it also increases the level of perceived empathy from an adult.

Disruptive behaviors, when displayed by a student who takes charge in his or her own way, can sometimes be reframed as great leadership skills. The teacher can ask the student to use those abilities to help lead the class. In the case of the disruptive class clown, the reframe would be along the lines of admiring the student, then reframing the clown act as natural comedic skill. A possible redirect could consist of a challenge to the student to use that skill in a creative way and in an appropriate setting that can be set up by the teacher according to the personality of the student.

**Leaving the ego at the door**

It is readily apparent that to follow this relationship approach, a teacher or school administrator must have the capacity to suspend the flaring up of his or her own impulses, issues, and negative reactions. Young adolescents are highly skilled at reading teachers and identifying the things that make them impatient, rigid, angry, and upset. Young adolescents often share insights with each other about what annoys teachers and school administrators. The ability to manage one’s own issues as they arise is one of the counselor’s most demanding skills. It also marks the difference between the effective and the ineffective counselor (Van Wagoner, Gelso, Hayes, & Diemer, 1991). It is also an assessment of truly effective relationship-based teaching. Once a professional gives in to emotions such as anger, exasperation, or displeasure, his or her ability to function becomes impaired to a degree. It seems no one knows this better than some young adolescents, who may be quite aware of the effects they have on adults.

When a teacher takes the comments and manipulations of students personally, interpersonal chaos is likely to follow. Thus, it is a good idea for a teacher to learn to suspend his or her own issues as they arise—to “place them on the shelf,” so to speak, to
be addressed later. One of the hidden advantages of working with young adolescents is that they have much to teach us about our own reactions and habitual ways of interacting. All too often, the student becomes the teacher of lessons that may not be learned in any other context (Hanna, 2002). Suspending one’s own reactions is a skill, to be sure, and it is a skill that can be improved with practice.

Leaving the ego at the door of the classroom is perhaps the most valuable suggestion we have to offer, along with showing empathy. Without this, however, empathy may never get a chance to emerge. Young adolescents closely watch the reactions of adults to see if they practice what they preach. For example, if Tom, a seventh grade student, erupts in class one day because he is being teased for being a “suck-up,” a very typical teacher response is, “Just try to ignore what the other kids are saying.” However, if a teacher or counselor tells a student to “ignore” the taunts or insults of another and then reacts angrily to being disrespected, the student, like most of us, will have little respect for what amounts to hypocrisy. Demanding respect is not as effective as earning it, and how the teacher comports himself or herself has much to do with how he or she is viewed and respected by students. To successfully build relationships and apply the skills mentioned in this article, leaving the ego at the door can be viewed as a prerequisite. At various times, leaving the ego at the door can be connected to issues of culture as well.

When a disruptive young adolescent routinely pushes a teacher’s buttons, that teacher has an ideal opportunity to apply the practice of leaving the ego at the door. It is human nature for teachers, or anyone for that matter, to get upset when an adolescent pokes fun at a personally sensitive topic or issue. This is especially true when it comes to the topic of authority. Many teachers believe that they must have absolute authority in the classroom. They also believe that this authority comes automatically with their status as the teacher and does not necessarily have to be earned. When students question this authority by being non-compliant or engaging in disruptive behaviors, they may easily trigger an emotional reaction from the teacher see Dooner, et al., in this issue. For example, Sammy, an eighth grade student, might say, “Why should I listen to you? You’re just a middle school teacher. Why don’t you have a good job?” The unexamined response that a teacher might give is this: “You have no right speaking to me like this. I know a lot more than you do, and I know you have detention today. See me after school.” Because teachers do have authority and certain privileges afforded to them by their position, anger and frustration often lead to the abuse of power in punitive ways. This usually happens when the adult does not take the opportunity to examine his or her own vulnerabilities on a regular basis. When the disruptive adolescent repeatedly insults or disobeys the teacher, the teacher’s ego takes over, demanding respect.

If the teacher had taken the time to examine his or her own vulnerabilities, he or she might have said, “You sound like my mother. She didn’t think I should become a teacher either. She wanted me to wear a starched shirt and tie every day and work in a big law firm. But I tell her I get to be a part of the lives of more than 120 seventh graders—including yours, Sammy. What more power do I need?” Then the teacher can turn the topic around to question the student by saying, “What does your family say to you about what you hope to do someday?”

When a teacher is self-aware of vulnerabilities, such as the need for power, he or she is more likely to respond strategically rather than emotionally. For example, a teacher who knows he is sensitive to students questioning his authority can anticipate that middle grades students will, in fact, question his authority. Such awareness can lead to the use of empathy or the admiration of negative behaviors, as previously discussed. In essence, the key to leaving one’s ego at the door is awareness.

**Multicultural connections**

Developing relationships with students who come from culturally different backgrounds can be challenging and requires specific skills from new and experienced teachers alike (Nieto, 1999a, 1999b, 2008). The recommendations for forming relationships made earlier in this article are essential when cultural differences are present. That is, having empathy, admiring negative behaviors, and leaving one’s ego at the door can go a long way toward bridging the gap between culturally or linguistically different (CLD) learners and the teacher.

The challenges within the cross-cultural encounter lie in overcoming the additional barriers that prevent teachers from letting down their guard to empathize and develop stronger relationships with students. These barriers exist due to a fear of the culturally different, a lack of knowledge about the differences and similarities between cultures, persistent negative stereotyping, and general intolerance. To overcome these barriers.
and develop multicultural competence, a teacher must overcome his or her fears and unresolved issues regarding cultural difference. This can be achieved by gaining deeper knowledge about himself or herself and the culturally different student. (Bradfield-Kreider, 2001).

Practices from the field of counseling have great promise for enhancing relationships in the culturally diverse classroom. In counseling, multicultural competence consists of being acutely aware of cultural attitudes, beliefs, knowledge, and skills of both the counselor and the client (Arredondo, 2003). Training new counselors involves an examination of how the new counselors feel about themselves and culturally different clients. Such competencies can easily be used as a guide for classroom teachers who want to enhance their relationships with CLD students.

It is important to help teachers become aware of how their racial and cultural heritages may impact their classroom climates. This awareness helps prepare teachers to identify and work through any existing intolerance they may have for students who come from different ethnic, racial, class, or religious backgrounds. It is equally important for teachers to be aware of their negative and positive emotional reactions to CLD students. For example, if the disruptive adolescent described in the previous scenario happens to come from a racial or ethnic background that is different from that of the teacher, checking one’s ego becomes more complicated. It is, therefore, vital for the teacher to be aware of his or her cultural and personal biases and the connections between the two. Then, when challenges to authority occur, the teacher who is aware of his or her “stuff” is better equipped to respond in more strategic ways. Such self-examination helps teachers leave their egos at the door and ultimately develop empathy for those they teach.

For teachers to engage in successful intercultural interactions, they must maintain an astute approach to learning relationships and be aware of the ways schooling helps to reinforce social class differences (Hipolito-Delgado & Lee, 2007). Marginalization refers to the historic and systemic ways in which people are adversely affected by racism, poverty, and other forms of oppression (Green, Conley, & Barnett, 2005). Teachers who are vested in educating students who come from such backgrounds should develop relationships by making meaning of the curriculum as it relates to their lived experiences outside the school. Taking this approach allows teachers to share their own personal experiences about hardship, triumph, and failure, regardless of the similarities or differences with the student’s life.

Programs such as Facing History and Ourselves (www.facinghistory.org) and Rethinking Schools (www.rethinkingschools.com) provide curricular materials that are designed to provide these kinds of shared self-examination experiences in the classroom. Facing History and Ourselves engages students from diverse backgrounds in an examination of racism and prejudice to promote a more informed and tolerant citizenship. Through study and discussions of current and past historical events, students are encouraged to analyze their own thinking, see the world from more than one perspective, and place themselves in someone else’s shoes as they examine events from history around the world. Together, students and teachers struggle to form judgments about human behaviors. Curricular materials expose students to such topics as violence in Northern Ireland, genocide in Cambodia, AIDS victims in Africa, anti-Semitism in London, or Mexican immigration struggles in California. Even though many of these events may occur miles away in different states and different countries, many of the core

*Teachers can best develop empathy for students when they are aware of their own personal and cultural biases.* photo by Allan Gahlo
issues are still the same. When teachers use curriculum and content that hold personal meaning to them and their students, barriers are more likely to break down for everyone, and relationship building has a better chance.

One strategy from *Teaching History and Ourselves* is called the Life Road Map (www.facinghistory.org), which allows teachers and students to develop a map of their lives by creating sequences of events, including important decisions and inspirations. This strategy would be useful to a teacher with students who have recently immigrated to the United States. It would promote an appreciation for one’s own culture and for the cultures of others that are represented in the classroom. It also would provide a forum for sharing difficulties that teachers and students have faced, some of which will be a result of culture and race.

A similar strategy, developed by *Rethinking Schools*, provides a template for teachers and students to write a poem called “Where I’m From” that reveals information about their lives outside school (Christensen, 2002). Students are encouraged to include information in the poem by studying items found in their homes, in their yards, and in their neighborhoods and the names of relatives, foods, and places they keep in their childhood memories. For a teacher with students from a variety of cultures in one classroom, these poems could be read aloud and posted to provide a powerful way of building relationships and community in the classroom. For both of these strategies, it is critical that the teacher participate by completing the assignments and sharing them as well.

**Conclusion**

Efforts to improve education must focus on the single most important component: the classroom teacher (Ingwalson & Thompson, 2007). Teachers in middle level schools must be well prepared to face the challenges of working with young adolescents; and critical components of teacher preparation are the knowledge and skills from education and related fields that will enable them to develop effective, and often unconventional, management systems in their classrooms. This effort must begin with a new paradigm in which teachers view classroom management as an ongoing exercise in building relationships.

For dealing with the most challenging of students, teachers can learn and apply strategies used in the field of counseling and psychotherapy, such as building empathy, admiring negative attitudes and behaviors, and leaving one’s ego at the door. It seems particularly important to provide specific strategies for dealing with what can often be the problems that prevent us from persevering in the important work of helping students learn. In the area of classroom management, it is critical that teachers find ways of building relationships with *all* students, from the most motivated to the most difficult. To borrow the words of Rogers and Renard (1999), when we enter into understanding human needs and relationship-driven teaching, “amazing things can happen” (p. 34).

**References**


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This We Believe: Educators of Young Adolescents Are Just Like the Students—As Learners!

Paul D. Deering, Deborah Zuercher, & Sheila A. Apisa

“The teachers are just like the kids!” This conventional wisdom is especially true for those who teach young adolescents; just observe a middle level faculty meeting to see all the student roles writ large—teacher’s pet, class clown, fashionista, I-have-that-report-here-somewhere… The truism is all the more accurate regarding how educators of young adolescents learn best—just like the kids! Fortunately, National Middle School Association (NMSA) has long offered excellent guidance on the education of young adolescents in the This We Believe series, and by extension, for the education of educators of young adolescents. With many districts facing shortages of qualified teachers, having difficulty retaining those they have, and with an under-representation of teachers of color, developing and retaining excellent teachers is crucial (Goodlad, 1990; Ingersoll, 2001).

Practicing what we preach

This We Believe: Successful Schools for Young Adolescents (NMSA, 2003) offers a set of 14 recommendations for the kinds of cultures schools should construct and the opportunities they should provide for young adolescents (Figure 1). With very little tweaking, these recommendations offer an ideal blueprint for designing, operating, and evaluating programs for educators of young adolescents. We advocate these 14 practices in middle level teacher education and school or district professional development programs, not only for the benefits of modeling them for educators, but because they work with adults and kids alike.

The Master of Education Degree in Curriculum Studies with a Middle Level Emphasis program (MLMED) at the University of Hawai‘i at Manoa began in June 1996, with the goal of building a leadership base for middle level school renewal in the state (Deering & Port, 1995). The MLMED was conceived by a task force representing multiple public and/or private organizations that referenced many teacher education documents (e.g., National Board for Professional Teaching Standards [NBPTS], 1993; NMSA, 1991a, 1991b) as well student-oriented sources such as NMSA's (1982) This We Believe (TWB). Each subsequent incarnation of TWB has informed the program, and we use the 2003 edition in this article as a lens for analyzing the MLMED and as a template for designing effective professional development for educators of young adolescents. We have clustered the 14 TWB recommendations into three broad categories, and we will address them in this order: 1. organizing principles, 2. relational supports, and 3. learning and assessment.
Hawai‘i is America’s most diverse state, with a “majority minority”—about 75% of the population is comprised of persons of Native Hawaiian, Japanese, Filipino, Chinese, Korean, Vietnamese, Samoan, Tongan, Marshallese, Micronesian, African American, Native American, Latino and other Asian and Pacific Islander ethnic/racial groups. Hawai‘i is indeed a vacation paradise, yet astounding wealth coexists with astounding poverty, ill health, domestic violence, and substance abuse, in both urban and rural areas. Like many other locales, non-whites, particularly persons of Native Hawaiian, Filipino, and other Pacific Islander cultures are most likely to suffer from these social and economic ills. About three-fourths of the state’s 1.2 million people live on the island of O‘ahu, where the capital city of Honolulu and the sole state university, the University of Hawai‘i at Manoa (UHM, main campus), are located.

Hawai‘i’s schools face many challenges. Almost one-fifth of the state’s students attend private schools,
one of the highest rates in the nation (Essoyan, 2008). Meanwhile, schools in the single, state-wide public school district, the Hawai’i Department of Education (HIDOE), are substantially under-funded, especially in terms of facilities.a An additional challenge is helping children from many linguistic backgrounds master Standard English while also maintaining their native languages. For many, pidgin, Hawai’i’s unique Creole dialect, is the first language (Da Pidgin Coup, 2004).

Hawai’i’s large, hierarchical department of education and the state’s many private schools have been slow to change and adopt research-based reforms (Deering, 2002; Raywid, 2002), including middle level education approaches (e.g., Carnegie, 1989, 1995; NMSA, 2003). Given the socioeconomic challenges and the slow rate of educational reform in Hawai’i, it is not surprising that young adolescents throughout the state exhibit areas for concern, including high levels of health risk behaviors, behaviors that contribute to school climate problems, and low scores on academic achievement tests (Education Week, 2000, 2004, 2008; HIDOE, 2000; Pateman, et al., 2000).

Fortunately, there has been increasing progress in middle level school reform in Hawai’i over the past decade and a half. The Hawai’i Association of Middle Schools (HAMS), an NMSA affiliate, has led the way with workshops and conferences since 1989. In addition, the HIDOE promoted developmentally appropriate middle level practices with growing resolve during the 1990s, and in 2001 adopted the Hawai’i Middle Level Education Policy, which is very much in line with This We Believe (NMSA, 2003).

The MLMED program

While the MLMED draws upon a substantial research base, a key focus has always been sensitivity to the diverse personal and cultural characteristics of the participants. Numerous studies have chronicled the failure of the “banking” approach (Freire, 1970), in which “experts” tried to simply transmit to teachers “new and improved” methods (Fullan, 1993; Richardson, 1990; Sarason, 1971; Scott, 1999). In contrast, successful school improvement efforts promote educators’ empowerment as professionals, wherein the educators define and implement reforms to improve their own schools (Cohn & Kottcamp, 1993; Darling-Hammond, 1997; Freire, 1970; George, Stevenson, Thomason, & Beane, 1992; Jackson & Davis, 2000; Wasney, Hampel, & Clark, 1997).

Calling for teachers to be empowered change agents presents a daunting challenge for many, as they are often socialized by teacher education programs and school systems into hierarchical power relations and fixed conceptions of best practices that order them to “just do what you’re told” (e.g., Zeichner & Noffke, 2001). Deference to authority is also a cultural tendency for many Asian, Pacific Islander, and other non-dominant cultures (Pang, 1995; Vogt, et al., 1987) as well as for females (e.g., Goleman, 1995). With these historical and contextual considerations in mind, the MLMED was designed to apply effective middle level education practices (e.g., Carnegie, 1989, 1995; Erb, 2001; Jackson & Davis, 2000; NMSA, 1982, 1995, 2003) as a means of empowering the state’s middle level educators to improve their schools themselves (Figure 1).

The MLMED is based on five Professional Standards for Teachers of Early Adolescents that call for knowledge of, competence with, and inquiry into:

1. Young adolescent development
2. Subject area content and pedagogy
3. Developmentally appropriate curriculum, instruction, and assessment for diverse learners
4. Communication, counseling, and group dynamics strategies
5. Professionalism and leadership (University of Hawai’i at Manoa College of Education, n.d.)

To date, more than 200 educators, mostly classroom teachers, have participated in the MLMED (Figure 2). Six O’ahu cohorts and one Maui cohort of 25 to 35 persons each have completed the program in a two-years-plus-summers schedule, with a seventh O’ahu cohort in progress.

The MLMED has attracted a diverse array of public and private school educators, including high proportions of ethnicities underrepresented in the state’s teaching force, educators over age 35, and those working in low-income schools or outlying schools (Figure 2). The substantial proportion of participants admitted under academic probation has allowed us to “cast a wide net” to include those who have struggled with standard English or who have come from less elite K–12 and undergraduate schools.

The MLMED has engaged in ongoing assessment and evaluation to ascertain the extent to which we are engaging in the processes and promoting the outcomes to which we are committed. Our evaluation efforts include
anonymous surveys of participants conducted every semester (Deering & Stone, 1998), a dissertation study involving participants whose identity was kept confidential from faculty (Ashford, 2002), collaborative scholarship (Deering, et al., 2005; Deering, et al., 2006), plus the standard university course evaluation process. In addition, the faculty members conduct ongoing participant observation (Bogdan & Biklen, 2007) with almost all participants, past and present, in professional contexts and via e-mail. Such personal contact is one of the benefits of a relatively small and isolated setting like Hawai‘i. These varied sources provide triangulated data for describing and assessing the program (McMillan, 2008).

Organizing principles

The MLMED is designed as an inservice professional development program for two reasons. First, the state had no entry-level middle level license at the time the program was created, so there was no point in creating an initial preparation program that led nowhere. Second, and most important, the MLMED’s driving purpose is to promote systemic reform at the middle level by focusing on educators who already work with young adolescents and who are committed to them.

Most participants come to the MLMED with an elementary generalist (K–6) or secondary single-subject (7–12) preparation, with a smattering holding K–12 licenses in special education or the arts, plus some unlicensed private school teachers. What all have in common is a love for young adolescents and little or no specific preparation for this age group. This population fits NMSA’s (2003) criterion of educators who value young adolescents (Figure 1), and we attempt to ensure this in the admission process with a rubric that specifies enjoyment and appreciation of the age group (grades 4 to 10, ages 10 to 16, by our criteria).

The MLMED also ensures that no one graduates without demonstrating in their portfolio enjoyment and appreciation of young adolescents and their education, under Professional Standard 5: Professionalism and leadership. Participants must show in writing in the précis and through artifacts (exemplars in their dossiers) that they indeed enjoy and appreciate young adolescents, as exhibited in this excerpt from 2006 graduate Christine “Chisa” Barroga’s précis:

Many educators have said time and time again, students do not care how much you know until they know how much you care. “It is only when students feel a connection with their teachers—when students believe that they are recognized, respected, and valued—that teachers are in a position to make a difference in students’ lives.” (DuFour & Eaker, 1998, p. 281)

Building connections and showing the students how much I do care about them is a very important part of my curriculum. … The many Tribes activities (Exemplar #13 [sample lessons]) that I do with them in advisory and my other curriculum areas help them see how human I am. It sets the foundation for the “talk story”iii time I engage in with them throughout the entire year. I am very proud of the closeness I am able to achieve with many of my students (Exemplar #73 [photos]). (Barroga, 2006, p. 86)

TWB’s (NMSA, 2003) other stipulation, that schools are staffed with professionals who are prepared to work with young adolescents, is the goal of the entire MLMED Program, our five standards, and their detailed benchmarks. Assessment of this goal is provided on page 21, where the portfolio is described in detail.

Figure 2 Characteristics of MLMED\(^1\) participants

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Mean Percent(^6)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal</strong></td>
<td></td>
</tr>
<tr>
<td>Ethnicities Underrepresented in Teaching Force(^2)</td>
<td>38</td>
</tr>
<tr>
<td>Japanese, Chinese, Korean Ancestry</td>
<td>42</td>
</tr>
<tr>
<td>European Ancestry/Caucasian</td>
<td>23</td>
</tr>
<tr>
<td>Female</td>
<td>71</td>
</tr>
<tr>
<td>Age 35 or over entering program</td>
<td>44</td>
</tr>
<tr>
<td><strong>Academic</strong></td>
<td></td>
</tr>
<tr>
<td>Entered Under Academic Probation</td>
<td>18</td>
</tr>
<tr>
<td>Graduation Rate(^3)</td>
<td>91</td>
</tr>
<tr>
<td><strong>School Context</strong></td>
<td></td>
</tr>
<tr>
<td>Distant/Outlying(^4)</td>
<td>49</td>
</tr>
<tr>
<td>Low-Income(^5)</td>
<td>48</td>
</tr>
</tbody>
</table>

\(^1\) MLMED = Master of Education Degree in Curriculum Studies with a Middle Level Emphasis Program at the University of Hawai‘i at Manoa.
\(^2\) Hawaiian; Filipino/a; other Pacific Islander; South or Southeast Asian; Latino/a; Native American; African American.
\(^3\) Students either have graduated or are still in the program.
\(^4\) Greater than one hour’s travel from the University of Hawai‘i at Manoa.
\(^5\) Low-income schools = ≥ 33% of students on free/reduced-cost lunches.
\(^6\) N = 192; does not include data on new O‘ahu Cohort 7 (N=35)
Besides describing educators in excellent middle level schools, **TWB** (NMSA, 2003) specifies that school cultures must be characterized by **courageous, collaborative leadership and a shared vision that guides decisions** (Figure 1). We approach these principles in several ways. Faculty participation is by choice (i.e., *shared vision*) not assignment. Both our O’ahu and Maui teams are comprised of a blend of full-time university professors and part-time lecturers. Most of the latter hold full-time teaching or staff-development positions—people who are grounded in the real world of classrooms and schools—and five are MLMED graduates. The faculty members are almost as diverse as the participants, including ten women and three men; three are persons of Hawaiian ancestry, two Asian, and one Filipino.

The faculty meet at least monthly in the MLMED to discuss curriculum, administrative issues, and student progress—much like a collaborative middle level team. The monthly seminars, attended by all faculty and students, allow for consensus decision making regarding seminar topics, scheduling of classes, assessment of portfolios, and more. We also ensure that participant voices are heard loud and clear through the anonymous surveys completed every semester and at the program opening and closing retreats. This feedback has alerted faculty to concerns about workload and differing faculty expectations, among other issues.

The MLMED promotes and assesses **collaborative leadership** by participants in their professional contexts with two of the Professional Standard 5 benchmarks: (B1) *Leadership within Your School* and (B2) *Leadership beyond Your School.* Participants in every cohort have raised concerns that the leadership requirement may violate local culture, since it is not *ha’aha’a*—Hawaiian for humble (Pukui & Elbert, 1992.iv; pronounced, ha-ah ha-ah). Many have insisted that they would never put themselves above peers by doing presentations or other high-profile leadership activities but would undertake more culturally-compatible leadership by *talking-story* or by having information ready if it is requested. Faculty members have readily accepted such low-key approaches to leadership, which are appropriate to the local cultural context. Interestingly, we have found that once participants complete the initial adolescent development class and get energized by the cohort, they inevitably expand their leadership efforts, often insisting on conducting presentations for their faculty.

The MLMED was explicitly designed to promote locally based leadership in middle level education; however, the extent to which participants have assumed or constructed such roles has exceeded our wildest expectations (Figure 3). Now, no state-level, O’ahu, or Maui policy meetings regarding middle level education occur without MLMED participant involvement. As but one example, the task force that wrote the *HIDOE Middle Level Education Policy* (2001) included several MLMED participants. Again, these leadership accomplishments are all the more remarkable for participants who are predominantly female and of Asian and/or Pacific Islander ancestry (Pang, 1995; Vogt, et al., 1987).

### Relational supports
Like a good middle level school, the heart of the MLMED is its relational supports, consisting of *organizational structures that support meaningful relationships and learning,* and a *culture that includes an inviting, supportive, and safe environment* (NMSA, 2003). Foremost of these is our team-like cohort. These fairly large (for a graduate level class) cohorts of 25 to 35 professionals

---

**Figure 3** Leadership accomplishments of MLMED participants

<table>
<thead>
<tr>
<th>Professional Context &amp; Accomplishment</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>National/International Conference Presenter</td>
<td>45</td>
</tr>
<tr>
<td>University Teaching</td>
<td>21</td>
</tr>
<tr>
<td>Regular or Acting School Administrator</td>
<td>14</td>
</tr>
<tr>
<td>HAMS&lt;sup&gt;2&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td>Board Member</td>
<td>17</td>
</tr>
<tr>
<td>President</td>
<td>9</td>
</tr>
<tr>
<td>C. W. Stevens Middle Level Educator of the Year</td>
<td>14/5</td>
</tr>
</tbody>
</table>

**Note:**

1. MLMED = Master of Education Degree in Curriculum Studies with a Middle Level Emphasis Program at the University of Hawai’i at Manoa
2. HAMS = Hawai’i Association of Middle Schools; Board = 18 members
from diverse contexts could simply remain groups, rather than teams or ‘ohana (Hawaiian for family). Thus, we begin the program with relationship building in an overnight retreat for the incoming and graduating cohorts at a YMCA camp on a remote beach. Barriers rapidly disappear and bonds are built across faculty-student; public-private school; and various geographic, gender, and racial/ethnic divides. This is accomplished through team-building activities, a collaborative exploration of everyone’s needs, good food, lots of laughs, and Standard Six—the student-generated standard that calls for pa’ina (Hawaiian for party or celebration).

The aloha (Hawaiian for love, friendship, compassion) built at the retreat is furthered by smaller groupings called “home bases,” much like a middle level advisory group. We compose the home bases of about six participants from the same or nearby schools. Participants are encouraged to enroll in the MLMED with multiple colleagues from a school—a cadre. Having school colleagues in the program allows participants to collaborate on school improvement projects, and provides close support during crises at home or work.

Further support for the home bases is provided by a faculty advisor, an [adult] advocate for every student who provides multi-faceted guidance and support services (NMSA, 2003). As noted earlier, the advisor and his or her home base spend a minimum of three hours together each month in the seminars. These sessions are divided roughly into thirds: 1. programmatic, administrative, and governance issues; 2. discussion of a “hot topic,” usually related to issues of diversity; and 3. advising regarding participants’ projects, professional contexts, and their portfolios. The advisor serves as the first reader of his or her home base’s portfolios, so the ongoing support and feedback are vital to participants’ completion of this complex process. Participants universally credit their advisor and home base as crucial factors in their survival and success in the MLMED, as expressed by a Cohort 1 graduate in Ashford’s (2002) dissertation research:

And that was an important thing. ... Dropping out wasn’t really an option. He [advisor] was always so supportive. ‘Cause several people have said—you know they came to points where [they said] “Ahhh, maybe I’ll drop out,” and he said, “No, no, no. That’s not an option. We can do it this way or this way.” (Ashford, 2002, p. 91)

Consistent with TWB’s school-initiated family and community partnerships (Figure 1; NMSA, 2003), the MLMED is designed as a partnership between the university and program faculty, and the participants’ families and schools (e.g., George, 2004; Goodlad, 1990; Jacobowitz, 1994). The great majority of classes are taught at our partner schools, Moanalua Middle on O’ahu and Maui Waena Intermediate on Maui. This makes an important symbolic statement that the MLMED is grounded in the “real world” of participants’ professional contexts, rather than the “ivory tower” of a university that is viewed by some as a legacy of Hawai’i’s colonial history. Our partner schools benefit from presentations and research collaboration by MLMED faculty and from informal talk story. They also benefit by having participants in every one of our cohorts, as there are always a least a few teachers who are willing to “commute” to graduate school by walking over to the next building.

The benefits of these partnerships for the MLMED and for our participants are numerous. Most O’ahu participants are spared about 40 minutes of commuting time by going to Moanalua Middle rather than UHM—and the parking is free and plentiful! Classes are held in the libraries of our partner schools, which are typically roomy, pleasant, air-conditioned spaces where everyone can settle, relax, and get ready to learn after a long day’s work with young adolescents. At both schools we have set up professional libraries stocked with resources published by NMSA, and these are available to the schools’ faculties as well as our participants.
We further extend our partnership with efforts and policies that foster health, wellness, and safety (NMSA, 2003). Classes are scheduled in after-school hours every Monday, one Wednesday per month, and during summers so that they are predictable and accessible for working and parenting participants. With the great majority of classes organized in cohorts, participants can progress without losing their sanity over confusing course catalogues or getting closed out of overbooked classes. The ready-made class roster also gives us “buying power” to seek out excellent instructors for classes not taught by team faculty. The healthfulness of the program is furthered by the home bases bringing food to give everyone enough energy to get through class. The program-opening adolescent development course addresses nutrition, so the grinds (food, in pidgin) are usually reasonably healthy.

Family-friendliness is perhaps even more important in Hawai‘i than in most other locales, since our families are quite stressed by the astronomical cost of living. This is especially true of our underpaid teachers, as many leave school each day and head to a second job in the tourist industry. The MLMED eases some of the burden by allowing participants to bring their keiki (child/children in Hawaiian) to class with them, if necessary—their are greeted by dozens of “uncles and aunties” eager to help with supervision. The libraries offer plenty of diversions and safe space so that there is little distraction by the keiki, and Mom or Dad can settle in and get to work.

The MLMED’s ‘ohana approach, including the family-friendly practices, cohort, home base and advisor has enabled numerous participants to bear a child (or two) while enrolled in the program and still graduate on schedule. Many others have encountered the inevitable crises that confront adults, such as illness to themselves or family members, deaths, divorces, financial strains, and more, yet the MLMED’s relational supports (Figure 1) pull them through at better than a 90% success rate (Figure 2). Such supports are especially important given our substantial number of participants from backgrounds disproportionately likely to encounter such challenges.

We have considerable evidence that educators who have experienced strong relational supports are more likely to implement them in their own professional contexts. For example, about two-thirds of the action research projects undertaken by participants in the recent O’ahu and Maui cohorts focused on middle level students’ social and emotional well-being, while most of the remainder focused on aspects of physical health. Participants initiated or revamped advisory programs, addressed bullying, and overhauled physical education programs to be more engaging and active. The writing of Cohort 5 graduate and HAMS 2007 C.W. Stevens Middle Level Educator of the Year, Irene Ueda of Stevenson Middle School, typifies the efforts of MLMED participants toward meeting the social and emotional needs of their young adolescent charges:

The MLMED Retreat brings together graduating and entering cohorts—an organizational structure that supports meaningful relationships and learning.

I also created my own “Uedadvisory” (Exemplar 65) to supplement the ready-made worksheets given to us to use in our advisory program. Although considered to be “extra” work by some teachers, I think that by supplementing the school-wide advisory lessons with my own, I am able to create and apply a true student-centered program that is flexible enough for students to determine their own goals and direction (Miller, 1999). I feel that by using advisory lessons such as these, I am following the NMSA middle school vision, where “successful middle-level schools anticipate students’ needs for support and provide a connected set of services in the areas of health, wellness, family, peers, and academics” (Van Hoose, et al., 2001, p. 69). (Ueda, 2006, p.73)

Further empirical evidence of MLMED participants’ attention to meaningful relationships; health, wellness, and safety; and multi-faceted guidance and support (NMSA, 2003) are offered in the next section where the portfolio is described.
Learning and assessment

The organizing principles and relational supports of the MLMED not only help participants to survive the program, but they are the foundation upon which the learning and assessment components stand, particularly the high expectations for every member of the learning community (NMSA, 2003; Figure 1).

Foremost of our supports for participants’ achievement is the backwards design of our assessment system (Jackson & Davis, 2000, p. 32), wherein our five professional standards and our formative/summative portfolio assessment process drive the whole program with the individual participant in the driver’s seat. In the first semester’s monthly seminars, all participants begin to systematically self-assess relative to each standard and the detailed benchmarks under it. As they get a clearer idea of their strengths, as well as pukas (gaps) in their knowledge and accomplishments, they are empowered to get what they need from the program. This knowledge guides participants’ choice of projects in particular courses as well as their choice of elective classes in our Exploratory Wheel.

The ongoing portfolio process, as opposed to the traditional after-the-fact thesis, acculturates participants into self-assessment, reflection, and self-direction, thus serving as a strong formative assessment tool for both participants and faculty—assessment and evaluation programs that promote quality learning (NMSA, 2003; Figure 1).

The portfolio consists of two items—the written précis, typically around 75 pages in length, and the dossier, the box or electronic storage system that holds the exemplars or artifacts. In each benchmark section of the précis, the participant must describe, critique, and link three components: 1. specific elements of the benchmark; 2. relevant professional literature; and 3. their own professional practice, as demonstrated in three to five exemplars. The types of exemplars offered are as varied as our participants and their professional contexts:

- Lesson plans and materials
- Samples of student work and teacher feedback
- Annotated video recordings of class sessions, parent conferences, professional presentations
- Samples of professional writing—team newsletters, school documents, reports, applications for grants
- Interdisciplinary curriculum units
- Minutes of team, task force, or other meetings
- Records from parent and student conferences and phone calls
- Intervention plans for addressing special student needs
- Letters or notes to/from students, parents, colleagues or community members
- Photos and descriptions of projects or activities
- Podcasts, websites, and i-Movies constructed by students or teachers
- Evaluations of teaching by students, peers, supervisors
- Evaluations and materials from workshops and presentations

Student work generally provides the surest evidence that a good idea successfully made it all the way to the “end user.” Thus, the several exemplars provided under a given benchmark generally include a combination of student- and participant-generated items and, often, an external document such as a task force report, all of which are explained and linked to literature in the précis.

For a portfolio to pass as the final Master’s Project it must receive a rating on our rubric of at least “adequate” by both the advisor and reader on every benchmark. This ensures that every MLMED graduate has met high expectations and is prepared to … work … with this age group (NMSA, 2003). The proof is in the box! When both the advisor and reader agree that a participant’s portfolio is ready, a public presentation is held; because of our collaborative ethos, we do not use the traditional term.
of “defense.” Our portfolio presentations are festive events, often held in faculty members’ homes, frequently attended by participants’ families and friends, and always accompanied by ono grinds (delicious food). While we have experienced growing pains in getting everyone on the same page regarding the construction and assessment of our portfolios, ultimately, this has been highly empowering for participants, as expressed in this confidential survey response by a Cohort Two graduate:

The portfolio has emboldened me to be more of a risk taker; to have a vision beyond what is now and to see where I would like to see my school going. To dream for my school all the things that I think will make it a great school. Having a portfolio gives me professional credibility that I might not otherwise have. (Ashford, 2002, p. 146)

The classes organized in cohorts that comprise the bulk of the MLMED (Figure 4) employ assessment and evaluation … that promote quality learning (NMSA, 2003; Figure 1) by emphasizing mastery as the criterion for evaluation—the only grades given are A, B, or I (Incomplete). Everything is considered a “work in progress,” so we encourage revision of a project until both the participant and faculty member(s) are convinced that it is excellent, even if this extends beyond the artificial limit of a 15-week semester. Thus, participants’ efforts in their professional contexts meet the highest possible level of excellence, and there is never the “death sentence” of a low grade.

MLMED classes allow a great deal of latitude for participants to pursue content, processes, and products that will benefit themselves and their students in their professional contexts—curriculum that is relevant, challenging, integrative, and exploratory (NMSA, 2003; Figure 1). Criteria for most projects not only permit but encourage collaborative school improvement projects (Figure 1), often undertaken by school cadres and sometimes by multi-school configurations. School cadres have designed advisory programs, interdisciplinary curriculum, anti-bullying programs, parent involvement initiatives, and numerous staff development presentations. Multi-school projects have included efforts to support new teachers, development of multicultural and fine arts curricula, investigation and refinement of homework policies, promotion of physical activity, and development of programs to ease the transition between school levels.

Student-directed learning and collaborative projects are just some of the ways the MLMED promotes multiple learning and teaching approaches that respond to diversity (NMSA, 2003; Figure 1). Everything in the program, starting with the introduction paragraph of our standards, calling for “knowledge of, competence with, and inquiry into …” (University of Hawai‘i at Manoa College of Education, n.d., italics added), promotes a critical stance toward knowledge—there is never “one right way” to do anything in the participants’ diverse professional contexts. Faculty members consciously strive to be aware and respectful of participants’ diversity, for example, in the varied conceptions of leadership. We also promote such sensitivity with participants regarding their own students. Evidence of participants’ valuing of diversity as well as students [participants] and teachers [university faculty] engaged in active learning (NMSA, 2003; Figure 1), can be found in several collaborative publications regarding multicultural educational practices (Deering, et al., 2003a,b; Deering, et al., 2005; Deering, et al., 2006), for example:

Curriculum is brought to life with projects where cultural heritage and adolescent concerns are the stuff of learning, thereby reinforcing family relationships and cultural pride. This does not happen when schools rely on the latest textbook or activity package from publishers thousands of miles away. (Deering, et al., 2005, p. 20)

Each semester of the MLMED is focused around a theme, expressed in the form of one or more questions such as the first semester’s questions, Who are young adolescents? and What do they need at school, home, in the community? (Figure 4). Courses focus on the theme and on the particular benchmarks that relate to it, helping to ensure program coherence and thoroughness. Most participants find the initial class on adolescent development to be the most beneficial—an eye-opener even for veteran educators. The two research courses are cited by many as the most difficult and as having the most impact in expanding their sense of professionalism. At the end of their course work, participants have addressed all the MLMED standards and benchmarks, and they prove this in their portfolio—processes that draw upon all 14 TBW components (NMSA, 2003; Figure 1).

Lessons learned

It has been incredibly rewarding riding the MLMED wave promoting improvement in middle level education in Hawai‘i and beyond. The faculty team has changed
**Figure 4 MLMED schedule—O’ahu**

<table>
<thead>
<tr>
<th>Semester</th>
<th>Theme/Course(s)</th>
<th>Targeted Standards</th>
</tr>
</thead>
</table>
| Summer-1            | **Who are young adolescents? What do they need at school, home, and in the community?**  
ITE-427: Classroom Teaching Models in Affective Education – Focus on Early Adolescent Development  
EDCS-622D: School Curriculum—Middle Level                                                                                                                     | 1                  |
| Fall-1 Exploratory  | **How can I help young adolescents to use technology effectively and ethically for learning and sharing?**  
ITE-480: Issues in Computer Education  
EDCS-642: Seminar                                                                                                                                                | 3                  |
| Spring-1            | **What is educational research? What does it tell us about young adolescents and education?**  
EDCS-606: Introduction to Research in Curriculum  
EDCS-642: Seminar                                                                                                                                                | 1,5                |
| Summer-2 Exploratory| **What else do I (participant) need to further my professional development?**  
Featured Option: Variety of special course offering(s) in Health Education — reduced tuition via Tobacco Settlement funds.                                                                 | Varies—1,2,4 likely|
| Fall-2              | **What is going on with young adolescents around our school and community? How can we find out?**  
EDCS-632: Qualitative Research Methods  
EDCS-642: Seminar                                                                                                                                                | 1,3,4,5            |
| Spring-2 Exploratory| **How do we work effectively with academically diverse populations of students?**  
SPED-620: Educating Exceptional Students  
EDCS-642: Seminar                                                                                                                                                | 1,3,4              |
| Spring 2 / Summer-3 | **Portfolio Presentation**                                                                                                                                                                               | All                |
| Summer-3            | **What are current trends in education? How can we exercise leadership in the profession?**  
EDCS-667D: Seminar in Curriculum—Middle Level                                                                                                                                                            | 5                  |
| August              | **GRADUATE!**                                                                                                                                                                                               |                    |

**Note:** MLMED = Master of Education Degree in Curriculum Studies with a Middle Level Emphasis Program.
with each new cohort, while the program structure has evolved gradually, always consistent with TWB's 14 characteristics (NMSA, 2003).

TWB's (NMSA, 2003) organizing principles are crucial to the MLMED and could easily be adapted by other teacher preparation and professional development programs. The importance of staffing middle grades schools with educators who actually enjoy young adolescents can scarcely be overstated (Van Hoose, Strahan, & L'Esperance, 2001). This entails careful selection in hiring or program admission of those who value working with this age group, with evidence of successful experience being paramount. Conversely, there are occasions when those who just cannot see the light should be encouraged to seek another level of education—elementary, secondary, or post-secondary—or even another profession altogether. Fortunately, we have not had this latter challenge in the MLMED, due, in part, to careful screening in program admission. However, a handful of “fence-sitters” have become middle level converts after completing our adolescent development class. A little bit of knowledge leads to lots of understanding and compassion.

The courageous, collaborative leadership and shared vision of TWB (NMSA, 2003; Figure 1) are essential for promoting empowered leadership and, ultimately, schools that improve (Goodlad, 1990; Jackson & Davis, 2000). Action research, with preservice or inservice teacher selection of the topics of inquiry, collaboration with learners on interventions, and assessment of their effectiveness empowers those “closest to the action” to constantly reflect and improve (e.g., Deering, 2003a, 2003b; Burnaford, Beane, & Brodhagen, 1994). Such principles can readily be adapted to university-, school-, or district-based teacher development programs. Trust and empower the professionals!

The relational supports of TWB (NMSA, 2003; Figure 1), embodied in the MLMED’s ‘ohana cohort/team structure, our advisory/home bases with faculty advisors, our school cadres, and our educator- and family-friendly policies are essential to the program’s better than 90% graduation rate and doubly so for the high proportion of participants from ethnicities underrepresented in the teaching force and with more less traditional, and sometimes marginalized, educational backgrounds. These supports also contribute to professional retention; only four of the 227 MLMED participants to date have left the education profession prematurely (one for full-time parenting), a vastly greater retention rate than that of the profession as a whole (Goodlad, 1990; Ingersoll, 2001). University and school/district teacher development programs can employ the principles of relational supports with an emphasis on collegiality and collaborative projects—study groups and book clubs are but two examples. And we all know that food—healthy food—helps boost attendance, motivation and energy levels at meetings. Quite simply, educators of young adolescents, like the students themselves, learn more and longer in groups where they are known, valued and supported.

The learning and assessment elements of TWB (NMSA, 2003) are embodied in the MLMED portfolio and in our high degrees of academic support and participant self-direction. Flexibility regarding the form and time frame of learners’ demonstration of accomplishments, but not regarding the quality of those accomplishments, ensures that excellence is the sole focus. The ongoing self-assessment and reflection of the portfolio and its use as the final master’s project ensure that proficiency is attained by every graduate across every standard and benchmark. Such principles are readily adaptable to school and district professional development, with evidence-based action research projects and professional development portfolios. Many university and state-level programs have already moved in this direction with the National Council for Accreditation of Teacher Education (2001) and National Board Certification (NBPTS, 2008) processes, which require demonstration of professional accomplishment.
The middle level education movement in Hawai‘i and beyond has been substantially advanced by MLMED participants. At the classroom level, participants have implemented innovations in teaching and advising. At the policy level, they have spearheaded school reforms, written publications, given presentations, and served on the HAMS Board and numerous task forces (Figure 3). This is proof that middle level educators of any ethnicity or gender can and will step forward as leaders when supported by an empowering professional development program. Between the accomplishments and the resiliency of MLMED participants, it is clear that the 14 components of This We Believe (NMSA, 2003) provide an empowering framework for the professional development of educators of young adolescents (Figure 1). The old truism definitely rings true: Educators of young adolescents are just like the students—as learners!

**Extensions**
The authors illustrate how educators can build professional development programs based on This We Believe principles.

**How can This We Believe inform your professional development program or teacher education program?**

**Author Notes**
1. Overall, violent crime rates in Hawai‘i are far lower than those of comparable U.S. mainland areas, however, property crime rates are fairly high.
2. Hawai‘i annually ranks in the bottom quartile of all U.S. states on teacher pay and per-student funding (e.g., Education Week, 2004).
3. Talk-story is a give-and-take, overlapping conversational structure common in Hawai‘i (Vogt, et al., 1987).
4. This source is used for all Hawaiian language translation.

**Editor’s Note**
This article was authored before the release of This We Believe: Keys to Educating Young Adolescents in November, 2009.

**Acknowledgment**
The authors wish to thank the entire MLMED ‘ohana for their hard work and aloha. Responsibility for all content of this article lies solely with the authors.

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Fostering engaged learning for middle grades students is a significant challenge for teachers everywhere, and in some jurisdictions, it has even become a government priority. For example, in Manitoba, a province in western Canada, all seventh grade students must be assessed annually for their level of engagement in learning. Students’ ability to interact with others, to self-reflect, and to submit assignments on time have now become indicators of student engagement (Manitoba Education, Citizenship & Youth, 2007). As one might expect, this policy has raised broader questions about what we actually mean when we talk about engagement and whether or not these criteria are, in fact, valid indicators of when learners are engaged. Certainly young adolescents who listen, ask questions, and dutifully complete assignments seem to be conscientiously assuming their responsibilities as students, but does that necessarily mean that they are engaged as learners? Further, although a significant body of middle grades research highlights the importance of self-reflection and the active involvement of students in their learning (Brodhagen & Gorud, 2005; Jackson & Davis, 2000), should the discussion surrounding the notion of “engaged learning” be reduced to a set of ideal behaviors and student performances?

With these questions in mind, some members of the Manitoba Middle Years Association purposefully worked to move the organization toward becoming a “community of learners” (Lave & Wenger, 1991) engaged in collaborative inquiry about the nature of student engagement and the pivotal role played by middle grades teachers. Based on the group’s discussions and ongoing observations in schools, it soon became evident that the dialogue on student engagement needed to extend well beyond the assessment of student behavior to an exploration of the various ways in which teachers and students interact. This led group members to the literature on authority, particularly the work of Roberts and Clifton (1995), and the role that authority assumes in developing strong learning relationships between teachers and students. Based on the group’s discussions and ongoing observations in schools, it soon became evident that the dialogue on student engagement needed to extend well beyond the assessment of student behavior to an exploration of the various ways in which teachers and students interact. This led group members to the literature on authority, particularly the work of Roberts and Clifton (1995), and the role that authority assumes in developing strong learning relationships between teachers and students. In this article, we summarize what we learned about student engagement and discuss how teachers can influence engagement by exercising authority in the classroom. Furthermore, we argue that it is the unique blend of an individual teacher’s social and pedagogical authority in daily teaching that fosters
engagement by encouraging students to “push through” challenging yet meaningful learning experiences.

**Fostering engagement: The importance of authority**

**Vignette 1: Student Engagement**

In Ms. Jones’s eighth grade Math class of 25 students, there are always a few who are constantly asking how they can move to the next letter grade or percentage on their report card; they will do whatever work needs to be done to get the A or A+. Then there are a number of students who seem more “into” the actual learning; whether they are working on projects in groups or individually, they seem to enjoy the work, although they don’t always get the best marks or complete the best work in relation to their peers. There are also a few, though, who seem to need her to constantly push or coerce them with such statements as, “Get your work done or you’re not going to the dance” or “Get your work done or you’re staying in at lunch to complete it.” And, of course, there are those who appear not to do much of anything. They sometimes attend class, although they are often caught wandering in the halls or loitering in the washrooms, and they rarely complete assignments. Ms. Jones tries to gently support them, to take the time to get to know them, and even to pressure them with some serious consequences, but they just don’t seem to care about schoolwork.

Who are the “engaged learners” in this scenario? We might argue that students whose primary motivation is to “get As” and those who “enjoy learning” are engaged; they have learning goals, they self-reflect, and they submit higher quality work on time. We might also argue that students who complete tasks grudgingly, or not at all, are disengaged from their learning. However, if we consider Schlechty’s (2005) description of the engaged learner as one who pays attention and shows commitment to an activity because he or she believes there is value in completing the task, then we might need to revise our earlier description of engagement to include the issue of compliance. The compliant learner completes tasks, whether they involve assigned projects or self-reflections, because the promise of extrinsic rewards—such as getting As—or the avoidance of unpleasant consequences—such as missing a dance—can be achieved by “getting the job done.”

Although complying to avoid an unpleasant consequence may be a necessary step on the path to engaged learning, it is not sufficient; overly compliant learners are less committed to creating meaning from learning activities, and, as a result, their knowledge is not easily transferred or retained (Bowen, 2003). Beyond this, students who are not engaged in their learning and also refuse to comply with classroom practice often retreat from the learning process altogether. In other words, they learn to “sleep with [their] eyes wide open,” or they rebel by substituting classroom activities with other, more entertaining tasks (Schlechty, 2001, 2005).

How do we help young adolescents see the value in “working through” learning activities and remaining engaged, even when they find activities to be tedious, irrelevant, or too challenging? Using power over students by overemphasizing external consequences, such as threats, might “get the job done,” but students may lack a personal commitment to learning, often only meeting minimal requirements. Conversely, using rewards to persuade students to learn can trivialize the importance of learning and lead to endless bargaining. We suggest that teachers can enhance engagement for...
middle grades learners by drawing on their social and pedagogical authority.

*Social authority,* also referred to as charismatic authority (Roberts & Clifton, 1995; Spady, 1973), is demonstrated by teachers who convey a strong sense of mission; they show genuine concern for the welfare of their students and are especially attuned to their individual needs. Whether it is expressed through their involvement in extra-curricular activities, such as team sports, or common interests such as music, this sense of affection helps students to feel individually recognized and cared for, and it gives greater legitimacy to the learning requests their teachers make. On the other hand, *pedagogical authority,* or expert authority (Roberts & Clifton, 1995; Spady, 1973), refers to the knowledge and experience teachers draw on as practitioners; it encompasses not only the “what” of teaching, but the “how”. Put simply, it is the knowledge demonstrated by teachers that helps students to care about what they are learning.

Exercising both types of authority in a balanced way is not an easy task because middle grades teachers often struggle to effectively balance young adolescents’ social and emotional needs with the need for rigorous academic learning (Dickinson, 2001). Widespread structural changes in middle grades education, such as flexible scheduling and advisory programs, have helped foster stronger interpersonal relationships between teachers and students. These relationships have fostered a stronger sense of emotional well-being but significantly less growth in students’ academic well-being. This raises important questions regarding the complex nature of teacher-student relationships (Midgley & Edelin, 1998). For this reason, we believe it is important to examine the different ways social and pedagogical authority can coexist in teacher-student relationships and their implications for student learning. Therefore, through the use of brief vignettes, we will examine four different combinations of social and pedagogical authority as demonstrated by the classroom practices of four hypothetical middle grades teachers. By doing so, we hope to demonstrate how different combinations of authority can affect student engagement differently and how they can either help or hinder teachers in establishing effective learning relationships with their students.

### Searching for balance: Challenges in the classroom

The challenge to effectively blend social and pedagogical authority is never an easy one; a teacher’s over-emphasis of one type of authority can sometimes mean an under-developed use of another in their day-to-day practice. For example, consider the following scenario:

#### Vignette 2: Social Authority

Mr. Tanner, a seventh grade English language arts teacher, greets students at the classroom door and takes the time to talk with individual students about the previous night’s sports games and the performance of their favorite teams. It is clear that they are enjoying themselves; jokes are being exchanged and students are generally content. However, the class needs to begin, so students are directed to their seats. They are assigned a worksheet of standard questions based on last night’s assigned readings. It focuses mostly on testing students’ ability to locate and retrieve specific information within the text, but it does not help them to create meaning from the readings. One might ask, “Why this text? Why these questions?” Although many students find the questions to be a bit meaningless, most begin to work immediately because the assignment is due tomorrow. Some students seem to find the work easy while others appear to be struggling with the vocabulary. The students really like their teacher, though, and they don’t want to disappoint him, so they get to work.

Teachers must foster individualized connections with students as an essential part of establishing and maintaining learning relationships.
seems to exist “alongside” his classroom teaching rather than being integral to it. He seems to make little attempt to get to know individual students as learners and to then modify his teaching practice to address their individual learning needs. Furthermore, he likely offers few opportunities to actively involve students in their learning through individual goal setting, problem solving, self-scheduling, and self-regulation (Midgely & Edelin, 1998). Although Mr. Tanner might spend a lot of time before and after class chatting informally with his students about their interests, his classroom teaching is aimed primarily at independent learners who can easily make sense of written text. In short, Mr. Tanner’s strength is his highly developed sense of social authority; however, his under-developed sense of pedagogical authority may mean his teaching lacks intent and meaning and, as a consequence, may leave many learners behind. In the end, many of his students will try to complete the assigned work, not because they are engaged in Mr. Tanner’s teaching or because they find value in the learning tasks (Schlechty, 2001), but because the students respect Mr. Tanner as a person, and they want to continue to be included in the valued social interactions that occur outside of instructional time (Lapthorne, 2007). In this classroom, the social relationships between the teacher and his students act as an enticement for them to comply with classroom expectations. Learning, in this case, is more about compliance than engagement.

What if a teacher is not able to rely as heavily on social authority as we have seen with Mr. Tanner? More specifically, what would a teacher’s classroom practice look like if he or she had an underdeveloped sense of both social and pedagogical authority? Consider Vignette 3.

Vignette 3: Underdeveloped Authority

As students enter the class, Ms. Clayton, an eighth grade math teacher, looks up, smiles, greets the students collectively, and then continues to mark assignments at her desk. On the whiteboard, she has written some specific instructions for the math questions that need to be completed, and she supplements these with some brief verbal directives. The students are politely instructed to begin working. Some do, but a few wander out into the hall, either to get some water or to go to the washroom. Ms. Clayton is busy working at her desk and doesn’t really notice that some students have left her class and are now wandering in the halls. In fact, her students organize themselves similarly in class every day: a small group of students sit together and collectively work through the assigned math questions, another group at the other side of the room sit together and talk and listen to music, a number of students sit quietly on their own and don’t really talk to anybody, and of course, a few leave and wander the halls aimlessly. The odd student will ask Ms. Clayton a question related to the work, and she will politely reply with a quick answer, but she has made it clear to her students that the assigned chapter in the textbook is well written and self-explanatory, and, based on the assumption that they are all independent learners, they should be able to answer the questions themselves without much assistance.

As the scenario illustrates, Ms. Clayton’s pedagogical authority remains under-developed and, as a result, her teaching practice only serves learners who are willing to comply and are able to “keep up” with her teaching, which involves an over-reliance on worksheets and textbooks and an over-emphasis on the memorization of decontextualized facts and rote learning (Midgley & Edelin, 1998). Furthermore, there is little opportunity for student input regarding the design of the academic
task, the adopted approaches to learning, or the criteria for assessment of learning. Most students do not appear engaged in learning, nor do they appear to value the academic tasks she gives them. In contrast to the last scenario, though, Ms. Clayton also has an under-developed sense of social authority, so she appears largely inaccessible and uncaring to her students, and her “generic” approach to teaching appears to be shaped by an overriding lack of concern for the students as individuals. This is a serious concern, because “belonging within a supportive web of relationships motivates young adolescents to make the effort and to take the intellectual risks that produce high-level learning” (Jackson & Davis, 2000). Because many of Ms. Clayton’s students feel unappreciated as people, few are engaged or compliant with her teaching requests. Most are either retreating from the learning process or rebelling in response to the alienating and indifferent classroom environment they experience daily.

Thus far, we have considered teachers who have demonstrated various degrees of social authority and, in both cases, a consistently under-developed sense of pedagogical authority in their teaching. What would happen if a teacher demonstrated strong pedagogical authority and an under-developed sense of social authority in their teaching? Consider Vignette 4.

Vignette 4: Imbalanced Authority

Mr. Edwards, a sixth grade math and science teacher is excited; he has planned a great unit on integers. He has decided to infuse some drama into his teaching to get the kids “up and moving,” and he has developed a creative art activity that will integrate most of the major math principles taught so far. There are a few kinesthetic learners, though, so he may decide to integrate more movement activities into his teaching as the unit progresses. To encourage students to be actively involved in their learning, Mr. Edwards plans to discuss his ideas for a summative assessment exercise and to explore any of their innovative ideas that he might incorporate into the activity. He can usually count on a few students, such as Tom and Susan, to offer some really interesting learning activities that benefit the class, but in the last few weeks, Tom has been uncharacteristically quiet and sullen. Mr. Edwards really hopes Tom resolves his personal issue, but, in the meantime, he plans to get him involved in some of the math learning activities so that he might stay focused on his work and not fall behind in his assignments.

In this example, Mr. Edwards has a highly developed sense of pedagogical authority, which means that he has an in-depth and flexible understanding of the content and a plan for how he will try to address the individual learning needs of his students. In fact, Mr. Edwards’s teaching practice demonstrates authentic care and concern for the individual learner, and, as a result, his students generally do see value in his teaching and trust his expertise. But because Mr. Edwards has an under-developed sense of social authority and weak personal connections with his students, he has very little idea of what is bothering Tom (or any other students for that matter) beyond issues of due dates and lost assignments. Furthermore, he does not appear to be interested in pursuing the matter. Mr. Edwards’s concern for his students is limited to matters of “curriculum learning,” and although his students might consider him knowledgeable in his subject areas, they do not really know him as a person, nor do they feel personally understood by him. In fact, Mr. Edwards’s inability to recognize a young adolescent’s struggles outside the realm of “academics” is professionally inadequate and even somewhat alarming; not only can a child’s struggles potentially interfere with his or her learning, but the teacher’s dismissal of a student’s personal struggles...
can leave the child feeling isolated and overwhelmed. Needless to say, this approach stands in stark contrast to the first priority of any school, which is to care for students so that they feel “understood and respected” as individuals (Noddings, 1992, p. xi).

Establishing a balance: The learning relationship

We have now explored the teaching practices of three hypothetical middle grades teachers through the lenses of three different combinations of social and pedagogical authority to understand their effects on student engagement in the classroom. What would an optimal balance of social and pedagogical authority look like in a middle grades teacher’s teaching practice, and how attainable is such a combination? Consider the following vignette:

Vignette 5: Authority in Balance

Ms. Limas, a seventh grade language arts and social studies teacher, is exploring the notion of the “persuasive argument” with her students. Although she had started with a specific theme in mind, Ms. Limas has since integrated some interesting suggestions from students that will enrich the learning process. In fact, the class has decided to extend the written work to include oral debates later in the unit. Ms. Limas is aware that certain students will struggle with the assignment, because either a series of purposefully written paragraphs will seem overwhelming to them, or some might be reluctant to share their opinions with their classmates. However, because Ms. Limas wants to assess students’ best efforts, she will speak privately with those who might benefit by focusing more intently on fewer paragraphs and those who might wish to challenge themselves further by extending the assignment beyond the present criteria. Furthermore, as the students prepare for the oral debates, Ms. Limas plans to offer some specific support to a few students who might feel overwhelmed with the public speaking component of the assignment. Amidst this planning, Ms. Limas remains particularly concerned about one student, Meghan, who lately seems distracted and withdrawn. Typically a highly energetic and jovial student, Meghan seems very tired, as if she has to “push herself” just to keep up with the day’s activities. She spoke with Meghan last week about her concerns but had little success, so she plans to speak with her again later today. First, however, she plans to consult with the school counselor to get his opinion on what her next steps should be.

Ms. Limas demonstrates strong pedagogical authority in her in-depth understanding of the subject matter and in the way she honors her students’ ideas and acknowledges their individual needs throughout the process. In effect, she engages her students by showing a regard for student perspectives and providing them with some choices for becoming actively involved in their classroom learning (Gladwell, 2008). Ms. Limas also exhibits teacher “withitness” by proactively communicating awareness and concern for students’ academic and social learning needs in both verbal and non-verbal ways, and she is, therefore, able to avoid the escalation of students’ struggles. Ms. Limas’s teaching extends beyond academics to include her students’ affective needs.

Although Ms. Limas may not necessarily know what to do to help Meghan or even how successful she will be in her attempts, she continues to show care and concern by recognizing and then trying to address the social-emotional and academic challenges experienced by her students. Whether the appropriate action will mean modifying a student’s present workload or involving specific social services, Ms. Limas’s strong sense of social authority clearly indicates to the student that the teacher cares about her struggles and that she will be supported by her teacher as she continues to learn to the best of her abilities. In other words, “relationships are enhanced when children are truly learning, and learning is enhanced when children are in a caring environment” (Midgley & Edelin, 1998, p. 200).

Implications for teaching and learning

Clearly, not all students can be engaged in learning all the time, and certainly students, as well as their parents or guardians, must assume considerable responsibility in the process. Regardless, we argue that the responsibility of teachers remains the same—to develop enough social and pedagogical authority in teaching to see beyond “ideal” student behaviors and performances to ensure that students can find personal meaning in their learning. Being rooted in the world of practice, however, we know this is no small feat; teachers need to have an in-depth understanding of subject matter, and they need to know how to engage middle grades students,
who are incredibly diverse in their aptitudes and levels of motivation to learn. As our four vignettes have demonstrated, providing opportunities for student input, exploring students’ individual interests, and considering task design, classroom approaches to learning, criteria for assessment, and self-scheduling are effective ways to integrate curriculum and to actively involve students in all aspects of their learning (Midgely & Edelin, 1998; Whitehead, 2005). Additionally, consistent opportunities to self-regulate and to receive developmentally responsive learning support are essential in helping students become engaged in their learning. Furthermore, teachers need to care deeply enough about the social-emotional well-being of their middle grades students that even if their attempts to show concern and offer comfort are ignored or rejected, they continue to care anyway. There is no “one right way” to care for the welfare of students, and there are many strategies that can be used to meet their diverse needs and to foster engagement in learning. In the end, the success of any one strategy or newly implemented idea depends largely on how well teachers understand individual students as learners, and how committed teachers are to the academic and emotional well-being of their students. As teachers consider the effective balance of both social and pedagogical authority in their classroom practices, they need to understand that challenging and meaningful learning is enmeshed in strong interpersonal relations with students. One does not compete with the other, nor can they be separated (Jackson & David, 2000; Midgely & Edelin, 1998).

Teachers need to have an in-depth understanding of subject matter, and they need to know how to engage middle grades students, who are incredibly diverse in their aptitudes and levels of motivation to learn.

How can teachers establish an effective balance of both social and pedagogical authority in their teaching practice? The following questions will help teachers reflect on the ways they exercise social and pedagogical authority in the classroom and the extent to which both types of authority are balanced in their daily practice.

a. Critically examine how you interact with your students. Do your interactions with them engender a sense that they are genuinely appreciated and cared for as individuals? Do your interactions engender a sense that they are respected and valued as unique learners? What evidence would you give to support your beliefs?

b. Think specifically about how your predominant teaching style meets the needs of the learners in your classroom. Are you giving them choices that are relatively superficial (i.e., which colors to use for a diagram in geography or which word problems to select in math), or are you allowing them to make substantive choices that convey to students that you understand and respect the different ways they learn?

c. Consider how aware you are of the fluctuations in how your students present themselves in class over time. Do you notice when a student seems “out of sorts” or overly quiet? Do you respond when a student seems restless and bored in class? Which students, if any, seem to “fall through the cracks” of your day-to-day teaching? What can you do to be more attentive?

d. Spend some time examining the teaching and interaction styles of your colleagues. Which teachers appear most effective at engaging their students throughout the day? Specifically, what do they do to effectively balance social and pedagogical authority in their teaching?

e. Finally, think about how you might sustain a balance of social and pedagogical authority over time. Which factors seem to influence this balance, and which are either within or beyond your control?

Conclusion

Students are engaged in learning when they show commitment to a task because they see inherent value in completing it, despite the challenges (Schlechty, 2005). Teachers can help students find personal value in learning tasks and work through their individual struggles by developing social and pedagogical authority (Roberts & Clifton, 1995) and by exercising these types of authority in a balanced way. Jackson and Davis
(2000) argued that, ultimately, meaningful change in education must reshape curriculum, instruction, assessment practices and the general “climate” of the school community. In conclusion, we believe that the success of any middle grades school should be measured by the degree to which it fosters more caring learning relationships between teachers and their students. After our group’s yearlong examination of the factors that affect student engagement, we encourage teachers to examine how the balance of both social and pedagogical authority is working for them.

Extensions
Do a self-check of your authority style. How well do you balance social and pedagogical authority?

How do you know when your students are really engaged? How should student engagement be assessed, and who should assess it? What have you learned about maximizing engagement by observing your colleagues in action?

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Excellent Teachers Leading the Way: How To Cultivate Teacher Leadership

Holly J. Thornton

Policy changes and mandates that may be at odds with middle school philosophy continue to come from state legislatures and departments of education. Increased emphasis on content coverage and test scores can be an obstacle to many middle level practices, such as curriculum integration and differentiated instruction. As this situation continues, it becomes increasingly difficult for middle grades educators to meet students’ needs as individual learners, to develop their voices and ownership in learning, and to explore students’ questions and concerns about the world around them (Kohn, 2000).

While an increasing number of well-prepared, exemplary middle grades educators know and understand this situation, these educators are often not the ones leading school change. Teachers are at the center of all reform movements, and without their full participation and leadership, any effort to reform education is doomed to failure. Real change cannot be mandated, even by well-intentioned policymakers (Lieberman & Miller, 1999). Given this, why is it that teachers are not taking the lead in current reform, and how can they best be supported as leaders of school improvement? A grassroots movement by teachers reinforcing the notion that “every teacher is a leader” may be vital to the continued success of middle level schools in this challenging time.

Benefits of teacher leadership

Middle schools benefit in numerous ways by increasing opportunities for teacher leadership. Teacher leaders serve as mentors and encourage their peers; they influence policies in their schools; they assist in improving instructional practice; and they help develop the leadership capacity and improve retention of other teachers (Katzenmeyer & Moller, 2001). As these teacher leaders work to help others develop skills and practices, they frequently hone their own teaching skills and improve their classroom performance (Ovando, 1994). The ultimate benefit is improved practice and increased student performance for all (Katzenmeyer & Moller). Higher student achievement, even as defined by traditional measures, increases in schools with strong teacher leaders (Lambert, 2003). Teacher leadership allows excellent teachers to impact their colleagues and the students in their classrooms, and this serves as an incentive for them to remain in the classroom. Given

This article reflects the following This We Believe characteristics: Committed Leaders — Courageous & Collaborative Leaders — Professional Development
these benefits, it may be worth asking, *What is the current status of teacher leadership?* and *How can we cultivate it in our middle level schools?* In the spirit of teacher leadership, let us ask teachers to answer these questions.

### Are teacher leaders in our schools?

Teachers enrolled in graduate programs that included a focus on action research and teacher leadership designed and implemented studies within their home schools. These teacher researchers used action research projects to examine teacher leadership in 44 middle level schools in 13 counties. All were rural or small community schools, identifying themselves as middle schools or middle schools within a K–8 setting. Most schools housed grades 6–8, with others housing grades 7–8 or K–8. All included elements of middle school organization such as teaching teams, common planning time, a verbalized commitment to teachers who are knowledgeable about young adolescents, and some implementation of integrated curriculum and exploratory classes. They included a range of educators in terms of experience, typically predominantly female, with 10%–15% males. Both male and female principals were included in the study, and the gender of the principal did not correlate with any findings. The schools ranged in size from 160 to 908 students, with the majority falling within the 500–749 range. The schools varied in terms of students’ ethnic diversity, with the majority serving less than 25% students of color. Half of the schools identified more than 50% of students as economically disadvantaged. In terms of student achievement test scores, the majority of the study schools were identified as meeting expected state growth goals (Figure 1).

The teacher researchers gathered data from multiple sources, including school mission statements, school and district policy documents, school improvement plans, and student achievement data. They also distributed surveys to all building teachers and administrators, with an average return rate of 35%. They conducted

<table>
<thead>
<tr>
<th>School Size/Number of Students</th>
<th>Grade Configuration</th>
<th>Student Achievement</th>
<th>Economically Disadvantaged Students</th>
<th>Minority Student Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>0–249</td>
<td>2%</td>
<td>P–8</td>
<td>Exceeded school goal by 10%</td>
<td>0–24%</td>
</tr>
<tr>
<td>250–499</td>
<td>27%</td>
<td>7–8</td>
<td>Met school goal</td>
<td>25–49%</td>
</tr>
<tr>
<td>500–749</td>
<td>48%</td>
<td>6–8</td>
<td>Did not meet school goal</td>
<td>50–74%</td>
</tr>
<tr>
<td>750–1000</td>
<td>23%</td>
<td></td>
<td></td>
<td>75–100%</td>
</tr>
</tbody>
</table>

Teacher leaders help develop the leadership capacity of other teachers.

*photo by Alan Geho*
follow-up interviews with a subgroup of five to ten survey respondents.

All of the data were analyzed using two frameworks. The first was a “leading structural change” schema (Knoster, 1991) which focused on elements necessary to sustain change (Figure 2). The second was Lambert’s (2003, p. 5) teacher leadership capacity matrix. Lambert described a school’s capacity for teacher leadership in terms of four quadrants running along two continua—skillfulness of teachers to act as leaders and levels of teacher leadership participation. Quadrant one schools have low skillfulness and low participation levels and are characterized by the following.

- Principal as autocratic manager
- One-way flow of information; no shared vision
- Codependent, paternal/maternal relationships; rigidly defined roles
- Norms of compliance and blame; technical and superficial program coherence
- Little innovation in teaching and learning
- Poor student achievement or only short-term improvements on standardized tests

Quadrant two schools, which have low skillfulness and higher participation, display the following characteristics.

- Principal as laissez-faire manager; many teachers develop unrelated programs
- Fragmented information that lacks coherence; programs that lack shared purpose
- Norms of individualism; no collective responsibility

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**Figure 2** Leading structural/cultural change schema
• Undefined roles and responsibilities
• Both excellent and poor classrooms
• “Spotty” innovation; some classrooms are excellent while others are poor
• Static overall student achievement (unless data are disaggregated)

Quadrant three schools have low leadership participation, but high skills. Schools in this quadrant may exhibit the following:
• Principal and key teachers as purposeful leadership team
• Limited uses of school-wide data, information flow within designated leadership groups
• Polarized staff with pockets of strong resistance
• Efficient designated leaders; others serve in traditional roles
• Strong innovation, reflection skills, and teaching excellence; weak program coherence
• Student achievement is static or shows slight improvement

Quadrant four schools have high levels of both skillfulness and participation in terms of teacher leadership. These schools are considered the target and may possess the following traits:
• Principals, teachers, parents, and students as skillful leaders
• Shared vision resulting in program coherence
• Inquiry-based use of information to inform decisions and practice
• Broad involvement, collaboration, and collective responsibility reflected in roles and actions
• Reflective practice that leads consistently to innovation
• High or steadily improving student achievement

The survey and interview questions were designed to elicit teacher input related to the quadrant descriptors and to allow teachers and administrators to place their schools within the matrix. Follow-up interviews examined the rationale for the placement, revealing barriers to increased skill and participation. Teacher leaders are disposed to work collegially toward change and improvement at the team level, school level, and beyond (Danielson, 2007). The researchers’ own understandings of their schools, relationships with participants, and commitment to change within their schools were all considered as teachers worked together in cohort groups to analyze their data. Finally, the teacher researchers devised action plans based on their specific schools’ potential and concerns. These plans were shared with administrators and, in some cases, implemented.

What is the status of teacher leadership?

Data from the participating schools indicated the following placements of schools within Lambert’s (2003) leadership capacity matrix: quadrant one 14%, quadrant two 18%, quadrant three 59%, and quadrant four 9%. Overwhelmingly, the data indicated that schools had a predominance of teachers who were highly skilled in leadership but had low participation of teachers in leadership roles and activities. Even though the schools had school improvement teams and multiple committees where teachers were often assigned “leadership” roles, these were not synonymous with the presence and cultivation of teacher leadership in the school. The defining characteristics of a school in quadrant
three—limited use of school wide data, polarized staff, pockets of excellence, and innovation with relatively static student achievement—were the norm in 26 schools. Only four schools in the study were reported to have a predominance of both teachers highly skilled in leadership and teacher participation in leadership roles. Data analysis revealed why more schools were not in quadrant four.

**What are the barriers?**

**Time.** Lack of time was consistently found to be a barrier to developing teacher leadership. Multiple demands kept the teachers in the study from committing the time necessary to act as leaders. These demands included individual and team planning, meeting the needs of the whole child, collaboration with parents and other professionals, completing paperwork and other administrative duties, committee involvement, and fulfilling new requirements for accountability and testing. Those who wanted to get more involved in leading change in their schools and districts felt they were not able to add yet another item to their already full plates, and they felt they did not have the time necessary to collaborate with and lead other teachers.

**Formal leadership structures.** At first glance, the teacher researchers viewed formal structures for participation on committees and school improvement teams as beneficial to cultivating teacher leadership. However, a closer look at the data revealed that teachers tended to view these leadership roles as perfunctory—more of a “rubber stamp” on decisions that had already been made. Further, teachers in the study reported that these “leadership” positions were often assigned to the same teachers over and over again. Those not included viewed this as cliquish, as if only individuals who agreed with the movement afoot were chosen. Teachers who found themselves on such committees reported they often felt saturated by too much involvement and, therefore, could not do the job well enough to make their participation worthwhile. They also reported collegial “jealousy” from those not selected (typically by the principal). At times, teachers were on these committees by default, when no one else wanted to do it. Even when change resulted from work on curriculum committees, parent councils, and teaching teams, participants reported they did not feel they were the ones setting the agenda. The vision and incentive to participate—two elements key to implementing change—were missing in these schools.

**Communication and fragmentation of faculty.** Ironically, middle school structures designed to promote connections and identity were reported as potential barriers to cultivating teacher leadership. The close-knit team identities and focus on grade levels as units of instruction often led to communication barriers and a sense of fragmentation of the faculty as a whole. Teachers spent so much time with their own teams or grade level colleagues that they often lost focus on the needs and concerns of the whole school. Regular school-wide communication was limited, creating feelings of disconnect among teams and grade levels. Respondents in some schools reported that principals’ actions did little to address these communication issues within buildings. Sometimes teachers felt that by keeping them apart, it was easier for the principal to maintain building-level control and make decisions without negotiating and compromising across many leaders.

**Principal leadership style.** It may come as no surprise that principal leadership was either a clear asset to the development of teacher leadership or a powerful barrier. The issue most frequently reported as impacting the cultivation of teacher leadership was the principal’s leadership style. The principal’s primary role is to be an instructional leader who mobilizes the energy
and capacities of teachers by supporting them in their endeavors to increase student achievement and learning (Fullan, 2002). To sustain school improvement, teachers and administrators need to work and create meaning together. Principals who were reported as engaging in collaborative leadership were seen as better equipped to both understand and support the leadership of others in the school. Those who were more authoritative and those who were laissez-faire proved to be the most troublesome. In schools where the principal was authoritative and preferred to make decisions alone, teacher leadership was relegated to service on committees and other formal structures where teachers felt they were merely there to implement predetermined plans. A limited number of teachers may have been part of the decision-making circle. Those not in that circle felt that the principal played favorites, thus causing division in the faculty. In schools where the principal was more hands-off with very little visual presence, teachers reported that there was confusion, lack of “buy-in,” and occasional in-fighting among teachers trying to take charge of the situation. These situations undermine the collective efforts and ownership of a school with strong teacher leadership and the benefits derived from those leaders.

Support for change. For real change to occur, teachers must become agents of change (Fullan, 1993). According to Knoster (1991), several elements must be in place and aligned to support and sustain change and improvement. In each of the school studies teacher researchers used Knoster’s model. The model included six elements, namely shared beliefs, vision, mission, incentives, resources, and skills. They looked for evidence of these elements through the analysis of surveys, interview data, and artifacts found in the school, such as mission statements, school improvement plans, schedules, professional development plans, and faculty meeting minutes.

The most frequently missing change elements across all types of schools in the study were mission and incentives, while vision, shared beliefs, and resources were the next most often reported missing. Even when schools had a vision grounded in shared beliefs, they often lacked a mission as a way to actualize that vision. In these situations, teachers felt that change did not occur as a result of acting on their vision and beliefs. Change was seen as mandated or handed down from others. In schools with low leadership skills, teachers did not work toward developing the mission. These teachers no longer wanted to take part in leadership that led to no results or results that sometimes ran counter to their beliefs. When incentives were lacking, teachers felt that their time and energy were limited, and they needed to focus on direct contact with students. They felt there was little intrinsic pay-off for their work, and there was no other tangible compensation. Without the elements necessary to support change, teacher leadership cannot be fully supported and realized within the school.

Principals who were reported as engaging in collaborative leadership were seen as better equipped to both understand and support the leadership of others in the school.

What action can we take?

Exemplary teachers who wish to remain in the classroom while leading school reform must find ways to take action. The teacher researchers developed action plans to address the primary barriers identified in each of their studies. Within each plan, they presented a timeline for implementation and identified key participants. They shared the plans with these participants, who often included building level administrators. Some plans were implemented immediately. Others led to dialogue, which called attention to the need for teacher leadership and to barriers that may have been present in the schools. The teacher researchers themselves acted as teacher leaders as they engaged in this action research. Overviews of some of the plans follow.

- Making time: staff meetings, PLCs, teaming
  Some action plans institutionalized time to develop teacher leaders within these middle schools. The plans included opportunities for teachers to meet and problem solve in staff meetings and to create professional learning communities (PLCs) as a way to empower teachers, set goals, and develop action plans. Plans also dedicated team time to give teachers a vehicle for voice and change. While staff
meetings, learning communities, and teams were all present and part of the time structure of the schools, they were not being used to cultivate teacher leadership.

**Communication: A new approach to staff meetings**

The research frequently revealed that staff meetings were an underused means for developing teacher leadership. In one action plan, teachers set up and led staff meetings with the principal’s support, and in other plans, teachers used staff meetings as opportunities to share best practices and exchange ideas related to school improvement and changes in district policy. Teachers often felt traditional meetings were not very productive, so allowing them to take the lead in restructuring the purpose and function of staff meetings gave them a sense of renewal and collective ownership.

**PLCs as teacher leadership**

The term *professional learning community* (PLC) is frequently misused to describe every imaginable combination of individuals with an interest in education (DuFour, 2004); however, true PLCs are collaborative cultures in which groups of teachers meet to lead change by focusing on student learning, making changes to improve their teaching practices, and evaluating the success of these changes. This allows PLCs to act as ideal situations for developing teacher leaders.

Many schools in the study were implementing PLCs (DuFour, 2007; DuFour, Eaker, & DuFour, 2005), but these PLCs often operated with predetermined topics and agendas rather than being opportunities for teachers to engage in inquiry and implement changes related to middle schools inadvertently foster competition and teacher isolation, especially across grade levels. Action plans included a specific focus on team time to regularly share and collaborate across teams and grade levels. Some schools planned to use “houses” in which students remain together across grade levels. This allows teachers in different grades to collaborate to meet students’ needs over their entire middle grades experience.

**Shared vision in action vs. the mission statement on the wall**

Research participants often felt school mission statements were created for accreditation purposes, not for guiding and reflecting lived experiences of faculty and students. Many action plans revisited the schools’ mission statements, aligning them with Knoster’s (1991) change schema.

**Recognition and sharing as incentives**

Publicly sharing thoughts, practices, and accomplishments is an important way to recognize individual teachers as school leaders. Some action plans provided opportunities for such sharing at staff meetings, through bulletin boards, or by e-mail. This public recognition provided an incentive for teachers to take action in leading school improvement and change. Instead of spending money on speakers or consultants, the plans reallocated this money to teacher leaders who could facilitate professional development owned and determined by teachers. When monies for financial compensation were scarce, teachers were rewarded with small incentives donated by the school community, such as dinner certificates, spa coupons, or breakfast brought to the school.

Issues they deemed important. Teachers may have been interested in the topics, but they did not fully own and engage in the process of developing the PLC in a way that could capitalize on widespread teacher leadership.

**Rethinking structures: Crossing team and grade level boundaries**

By emphasizing teams and team identity, some public recognition provided an incentive for teachers to take action in leading school improvement and change.

**Conclusion**

As we face challenges to middle level education from many fronts, it is encouraging that we have so many exemplary teachers who can act as our guides to meaningful student-centered reform. To capitalize on the strengths and commitment of these educators, we
must find ways to tap into and support their leadership. Teachers, themselves, can act as researchers to help identify barriers and challenges to cultivating teacher leadership in their schools, and they can develop action plans to address these barriers as they build a community of learners and leaders within the school. In this manner, they can continue the hard work of the middle level movement—taking steps to move forward. Finding ways to empower teacher leaders to take these steps may be crucial to the retention of excellent teachers (Thornton, 2004). As excellent teachers enable young adolescents to achieve their greatest potential, it is a win-win situation for all involved. Strong principals who are willing and able to truly share leadership with their teachers will recognize this, but it is likely they already know.

Extensions
The author describes Lambert’s framework for classifying leadership capacity in schools.

In which of Lambert’s four quadrants of leadership capacity would your school be located? What data support your judgement? What are some potential barriers to cultivating strong teacher leadership in your school? What actions can your school take to overcome these barriers?

References

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Coming in May to Middle School Journal Readers

Building and Sustaining Strong School Communities
—Supporting professional learning
—Implementing the middle school concept
—Fostering community through shared writing

Also in this issue
—Critical thinking through literacy
—Making global connections

In your mailbox in early May!
Angiline (first author) remembers her first day teaching middle school mathematics. She recalls feeling academically prepared, however, she was not ready for what was to come. She remembers being excited and enthusiastic about her first year of teaching, but she was not prepared emotionally for the 130 eighth graders she taught every day. They had so many needs. They wanted her to sign forms to go on field trips and to excuse their absences. They needed pencils, paper, and books. Mostly they wanted her attention, but Angiline had no idea how to meet the emotional needs of these young adolescents.

A colleague gave Angiline a book about how to make the most of her mathematics class time. Out of desperation and exhaustion, she tried some of the suggestions to make the beginning of class a valuable time for her and her students. She began to start classes with a critical thinking exercise. Initially, Angiline did this warm-up activity to help keep the students busy while she managed administrative tasks such as taking roll, returning homework, and attending to announcements on the public address system. But as Angiline got better at designing these starting tasks, her students came to enjoy the challenging exercises, and a caring classroom community began to form.

This article reflects the following This We Believe characteristics: Meaningful Learning — Multiple Learning Approaches — Adult Advocate

A call to care

Like Angiline, teachers assigned to entry-level or “low track” math classes are entrusted with the students who need them the most. These students may be academically disengaged and, perhaps, do not see how education, especially mathematics, relates to their lives. Students in these classes have many labels, including at-risk, English language learners (ELL), and urban students. Students of color, especially African Americans and Latinos, are likely to be enrolled in these entry-level classes in higher proportions (Oakes, 1995). Mathematics educators are called to engage and educate every one of their students, including these disenfranchised students. Based on recommendations in the literature and their experiences in the classroom, the authors believe that for every student to be successful, teachers must foster a caring ethic (Ladson-Billings, 2006).

The authors, Angiline and Al, are university teacher educators who share similar experiences building community in middle grades mathematics classrooms. In this article, they describe what a caring ethic looks like in a middle grades mathematics class, and they suggest specific practices drawn from their experiences that teachers can implement to make their classrooms more caring and engaging places.
Caring community of learners

As eighth grade mathematics teachers, the authors began the year building relationships with their students and encouraging communication to establish a caring ethic. In their mathematics classes, a caring community attitude was everything, and, as in any community, communication and relationships were paramount. Following Noddings (2002), an ethic of caring in the classroom has four key components. Teachers must model acting as caregivers and people who care for others in the classroom. Teachers and their students must engage in dialogue about caring as they seek to arrive at common understandings of the concept. Students must have opportunities to practice caring for other members of the classroom community. Finally, teachers must offer confirmation of the struggles and accomplishments of their students as they care for one another.

Caldwell and Sholtis (2008) provided further insight into developing an ethic of care in the classroom. They identified five characteristics of student-oriented teachers who care for their students: 1. They treat all students with respect by using their names and model how to show respect for other students and other teachers. 2. Student-oriented teachers encourage positive discourse in the classroom, which they demonstrate by giving constructive written encouragement on assignments and frequent verbal praise (Caldwell, 1999). 3. Student-oriented teachers listen to their students and provide them constructive feedback. 4. They are patient, believing firmly in themselves, their work, and their students’ abilities. 5. Student-oriented teachers encourage and inspire student thinking by providing time to think and self-discover and by asking higher-order questions.

Powell-Mikle (2003) studied African American students who were successful in mathematics and found that effective mathematics teachers exhibited a caring ethic characterized by teacher availability, positive classroom discourse, and clear explanations. The study participants wanted their mathematics teachers to be available at various times during the day and to spend time with them outside class. They wanted additional examples to reinforce concepts taught in class, and they frequently wanted teachers to ask leading questions until mathematical concepts became clear. The participants also valued their teachers’ effective questioning abilities and the ways they encouraged students to ask questions and gave respectful and patient responses to these questions. This “give and take” between students and teachers is characteristic of the kind of positive classroom discourse essential to good mathematics teaching (National Council of Teachers of Mathematics, 2000). All the participants valued clear explanations as a characteristic of effective mathematics teachers. For these participants, clear explanation meant working out the problems and sharing the thinking strategies with the students. Clear explanations also meant the mathematics teachers had content knowledge and were able to break the mathematical concepts into logical sequences.

Know your students

To foster caring during his teaching, Al began each year with a mathematical autobiography. Throughout this autobiography assignment, Al asked the students to concentrate on their mathematical experiences. He asked them about their families, their daily routines, and how they felt about mathematics (likes and dislikes). Al also asked them whether they were “good” at mathematics or had any mathematics triumphs or disasters. He included additional questions, which are listed in Figure 1.

Teachers can use a similar autobiographical activity to get to know their students and learn about the lives

Figure 1 Mathematical autobiography

- Tell me about your family; include all to whom you feel close.
- Tell me about your friends.
- Are you “good” at mathematics?
- Tell me about any mathematical triumphs or disasters.
- Do you like or dislike mathematics? Why?
- What do you like about learning mathematics? What do you not like?
- What is your first or strongest memory of learning or doing math?
- Have you ever been embarrassed, humiliated, or especially proud of your mathematical ability?
- Do you like/dislike all areas of mathematics equally? If not, which areas do you like/dislike the most? Why?
- Who or what influenced (either positively or negatively) your feelings about mathematics?
- How do you feel about taking this course?
- How do you think your attitude about mathematics will affect your math learning?
they lead. Do your students work? Should homework assignments be shorter than those for other classes? Are your students from a lower socioeconomic status? Will you have to discretely provide materials to some of your students? Do your students have access to technology at home, or will all work requiring technology have to be done in class? What are their interests? Can you make problem solving relevant to their lives? Are your students rural, urban, or suburban? All of these questions have important implications for the way you teach mathematics and can be learned from the mathematical autobiography. Knowledge gleaned from this activity will help teachers make mathematics relevant to their students’ interests and make informed decisions about the assignments they ask students to complete.

The mathematical autobiography also helps get students accustomed to writing in math class, facilitating communication, and integrating curricula. Reluctant writers can use a tape recorder or other audio-visual equipment to “write” their mathematical autobiographies. Teachers should model the activity by writing their own mathematical autobiographies and sharing them with their classes. Sharing a personal story makes teachers more human to their students, strengthens relationships with their students, and supports the development of a caring ethic in mathematics class.

Create opportunities for success

Teachers should help their students feel successful with mathematics, not just arithmetic or computation, which is typically the extent of the curriculum taught in entry-level classes. Angiline and Al both started their classes with five-minute warm-up activities dealing with non-traditional mathematics concepts. They had the most successes with logic problems and visual acuity problems.

Angiline frequently used her students’ names in the warm-up problems to make it interesting and to encourage them to pay attention to details (see Figures 2 and 3). She first introduced the mathematics concept she wanted them to learn or practice, then she gave them a grid to help solve the problem. Once Angiline’s students became proficient with the easier problems, she added more complexity by having them figure out, based on the logic problem, whether they needed a 3 X 3 matrix, as in Figure 2, or a 4 X 4 matrix to solve the problem. She also increased the difficulty by assigning logic problems with multiple facts to decipher about each person (Figure 3).

Angiline and Al’s students typically succeeded with imagery or visual problems. They noticed that students who thought they did not like mathematics participated, enjoyed,

**Figure 2 Sample problem 1**

<table>
<thead>
<tr>
<th></th>
<th>10 yrs</th>
<th>11 yrs</th>
<th>12 yrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anne</td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td>Liana</td>
<td>O</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Rachael</td>
<td>X</td>
<td>O</td>
<td>X</td>
</tr>
</tbody>
</table>

There are three girls in the Taylor family: Anne, Liana, and Rachel. Their ages are 10, 11, and 12. From the clues below, see if you can discover their ages.

1. Anne is not the youngest.
2. Liana is not the oldest.
3. Rachel is neither the oldest nor the youngest.

**Solution:** Rachel is 11. She cannot be 10 or 12. Since Liana is not the oldest (Clue 2), she must be 10. Anne, then, must be 12. Therefore, Rachel is 11, Anna is 12, Liana is 10. (We remind our students to write the solution to the problem, even though their solutions are summarized in the completed matrix.)

**Figure 3 Sample problem 2**

<table>
<thead>
<tr>
<th></th>
<th>10 yrs</th>
<th>11 yrs</th>
<th>12 yrs</th>
<th>Lisa</th>
<th>Maria</th>
<th>Mya</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anne</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td>Liana</td>
<td>O</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Rachael</td>
<td>X</td>
<td>O</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td>X</td>
</tr>
</tbody>
</table>

There are three girls in the Taylor family: Anne, Liana, and Rachel. Their ages are 10, 11, and 12. The girls’ middle names are Lisa, Maria, and Mya, but not necessarily in that order. From the clues below, can you figure out their middle names and their ages?

1. Anne is not the youngest.
2. Liana is not the oldest.
3. Rachel is neither the eldest nor the youngest.
4. Liana’s middle name does not begin with an “M”.
5. The eldest girl’s middle name is Mya.

**Solution:** We know that Liana’s middle name is Lisa (clue 5). Since Anne is the eldest (12), her middle name is Mya. Rachel’s middle name must be Maria.
and excelled when working these problems. Figure 4 is an example of a visual problem Al used in his classroom.

Mathematics classrooms are sometimes perceived to be sterile, boring places in which students work independently to solve problems and complete worksheets. To the contrary, mathematics teachers should facilitate collaborative, social learning. Implemented properly, such approaches can build camaraderie and help teachers—especially new teachers—better manage student behavior. Teachers should encourage their students to work together on these warm-up problems and support them with positive statements such as, “I like how Chandra and Javier are working together.”

Angiline and Al found that students who typically did not excel in arithmetic excelled in the types of warm-up problems discussed above. Perhaps this is because they do, indeed, learn differently than those proficient in computation. At the culmination of the warm-up activity, they encouraged their students to give oral explanations to extend their learning and to promote communication in their mathematics classrooms. They asked questions such as, “How did you come up with that answer?” or, “Did anybody discover a different way to solve the problem?” They asked their students to demonstrate their answers on the whiteboard, overhead projector, or in small groups.

Angiline and Al found warm-up problems such as those discussed here in logic magazines, critical thinking books and websites, teacher journals, and many textbooks aligned with NCTM standards. Some sources of warm-up problems are listed in Figure 5. These problems encouraged critical thinking yet were not high stakes. They collected this work with their students’ mathematics notebooks at the end of the grading period and only graded them for completion.

**Build community**

A colleague of the authors built community in his mathematics class by sponsoring a fantasy basketball league for his students. He would open his classroom 40 minutes before school started. Boys and girls participated in the league. Most of the students were not honor math students, yet they came to school early, enthusiastic about the math involved in managing a fantasy basketball team.
Another colleague fostered a caring community in his mathematics class by giving positive responses to student answers. Some teachers treat their students like game show contestants, demeaning students by dwelling on their incorrect responses—picture the teacher hitting a buzzer and shouting, “Wrong!” when a student replies incorrectly to an oral question. Instead, he used a variety of non-derisive responses. One method was to point out what question the student did answer or what part of the response was correct. He would also ask students how they came up with answers that were incorrect, and he would sometimes ask another student to assist, when appropriate. As one of his eighth grade students stated, “You never feel stupid in his class.”

**Conclusion**

Once Angiline and Al had their students hooked on mathematics, they were constantly reminded that their students were bright and capable. They learned to develop a caring ethic in their mathematics classrooms through the use of warm-up problems, mathematical autobiographies, fantasy sports leagues, and positive responses as well as manipulatives, cooperative learning, and communication. Their students developed mathematical knowledge and skills and, equally important, they grew as confident young adolescent learners.

**References**


**Extensions**

The authors describe classroom-tested strategies for developing a caring ethic in mathematics classrooms. In what ways do teachers in other subject areas create caring classrooms?

**About.com: Secondary Education Mathematics Warm-Ups**

http://712educators.about.com/cs/warmups/l/blwarmmath.htm

**730 Daily Math Warm-Ups**

J. Weston Walch, publisher
Hope Martin, author

**Daily Warm-Ups—Series**

Math Realm

**Critical Thinking Activities in Patterns, Imagery & Logic**

Grades 4–6; Grades 7–12
Dale Seymour Publications
Dale Seymour and Ed Beardslee, authors

**Salem-Keizer's Math Online!**

http://www.skonline.org/website/mathonline/mathfun.htm

**Pearson Scott Foresman Math Surf Problem of the day**

http://www.mathsurf.com/problemdofday/

**Building Thinking Skills**

Book 3 Figural
Book 3 Verbal
Midwest Publications
Howard and Sandra Black, authors

**Figure 5 Sources of math warm-up problems**

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Letter from the President
Cathie Thibodeau

As I sat down to write this piece and looked at the themes of Caring Relationships, Classroom Management, and Teacher Leadership, it was apparent that there was a common theme: passion.

Caring relationships are built by educators who have the passion for educating young adolescents and who recognize their uniqueness. A teacher will not give up on that recalcitrant student but, instead, digs deeper into his or her bag of strategies to find a way to reach students. The relationships are built on mutual trust, and it takes time to build that trust. When students know the teacher cares and trusts, they try harder to please the teacher—showing up, doing work that is vigorous, and asking questions.

This same trust carries over into classroom management. By trusting the kids and giving them a voice and ownership in the norms for a classroom, students feel empowered and trusted to monitor their own behavior. In Managing the Madness by Jack Berckemeyer there are many strategies readers can use at their discretion. I particularly like the fact that Jack includes humor. A person cannot work with 10- to 14-year-olds without a sense of humor, joy, and trust.

When I think of teacher leaders, I again think of those educators with the passion for middle level education and the ability to put rhetoric into reality—to build those trusting relationships with adults and students who challenge and support each other to succeed. I believe it starts in the classroom and grows with nurturing and guidance from administration. One way to see if this leadership role is a good fit is to share the team leader position.

Businesses often have teams work on projects and present them to clients or management. The business model trusts the teams to do their job. A wise principal in New Hampshire once said that you need to explain to the teachers what needs to be done and then trust them to do it.

Therefore, as middle level educators with passion, I trust all of you to do the best thing for our kids. It makes a world of difference.

Nominate a Colleague – The Distinguished Educator Award

Each year, NMSA recognizes outstanding practitioners in middle grades education with the Distinguished Educator Award. The award is intended to honor educators who have made a significant impact on the lives of young adolescents through leadership, vision, and advocacy. Each recipient receives

- A plaque that will be presented at the National Middle School Association Annual Conference and Exhibit.
- Complimentary registration and lodging for the NMSA Annual Conference.

Deadline: March 15, 2010
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A conference providing an in-depth look into topics essential to the success of middle level schools, including:
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Deadline: March 15, 2010
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We've made it easy and fun to get more ideas and information from National Middle School Association. NMSA's podcast show, Today's Middle Level Educator, is the place to hear conversations, interviews, and commentaries from authors, experts, middle level practitioners, and students. Visit www.nmsa.org/podcasts to listen to episodes on topics you told us you want to hear more about. NMSA podcasts are also available on iTunes!

Available Now
Motivating Young Adolescents — Jack Berckemeyer is joined by Kim Campbell, a classroom teacher and member of the NMSA On-Site Staff Development cadre. Jack and Kim share ideas about student motivation and the role of the classroom teacher.

Teammate of the Year Award

Each year, the Cal Ripken, Sr. Foundation and National Middle School Association will honor deserving youth that have made positive choices, have inspired others to act, and have become positive leaders in their communities. The first Teammate of the Year Award will be presented at the 2010 NMSA Annual Conference in Baltimore, Maryland. Any school implementing the Healthy Choices, Healthy Children (HCHC) character education curriculum will be eligible to nominate one youth for the Teammate of the Year Award.

Visit ripkenfoundation.org for award criteria, eligibility requirements, and application process details. Nomination materials will be available April 30, 2010, and nominations will be accepted through June 1, 2010.

Free Webinars for Math and Science Teachers

Visit the Middle School Portal: Math and Science Pathways website at www.msteacher2.org to access more than a dozen free recorded webinars. The latest topics:

- Interactive Whiteboards
- Reading Mathematics is Different
- Diigo: An Online Research Tool
- Universal Design for Learning
- Laboratory Safety

New NMSA Staff

Ann Draghi recently joined the NMSA creative team as a graphic designer, bringing fresh and imaginative ideas. Ann has a bachelor’s degree from The Ohio State University and more than 8 years of extensive layout and design experience.

Becky Schwarzell is our new general accountant in the business services department. Becky has more than 20 years of experience in the accounting and non-profit fields. She is responsible for accounts payable, payroll and other accounting functions.
Who Are My Students and Why Does It Matter? Using Service-Learning to Teach Children Impacted by Poverty

Katherine F. Thompson, P. Gayle Andrews, Courtney S. Jackson, & Mary Reagin

Before my first practicum in the middle grades education program at the University of Georgia, I had never experienced or devoted much thought to the effects of poverty on a community. I certainly had never imagined how a child’s learning and behaviors could be altered based on his or her socioeconomic status.

– Courtney Saxon Jackson, fourth grade teacher

Service-learning has impacted the very core of who I am as an educator.

– Mary Reagin, middle school math teacher

This article will focus on instruction, what Turning Points 2000: Educating Adolescents in the 21st Century calls “the daily bread of classroom life” (Jackson & Davis, 2000, p. 63). Instruction includes all the tools, strategies, lessons, and activities teachers and students use to learn. To be effective, however, instruction must mesh seamlessly with the curriculum, with the assessments students will use to demonstrate what they have learned, and with the students themselves: their needs, interests, and concerns.

This article will also connect directly to the overarching goal that guides Turning Points 2000—ensuring success for every student. Success is defined as fulfilling the book’s comprehensive vision of a 15-year-old who has been well served in the middle grades and, as a result, is an intellectually reflective, healthy, caring, and ethical citizen en route to a lifetime of meaningful work.

Powerful instruction that makes learning both meaningful and motivating is critical to fulfilling that vision. The story outlined in this article features two beginning teachers who are committed to student success and draw on the knowledge and experiences gained during their teacher preparation program to enact compelling and innovative instructional practices. Those practices tie directly to state standards and connect to the communities in which they teach and to students’ needs and interests. Two teacher educators—Kathy Thompson and Gayle Andrews—will tell the story of these novice teachers, describing the preservice program and related experiences that provided the foundation for their current and creative approach to instruction in their public school classrooms.

Background

Courtney Saxon Jackson and Mary Reagin entered the University of Georgia’s middle grades education program as part of a cohort of 50 students in August of 2007. Since the program uses the course prefix EDMS in the UGA bulletin, most preservice teacher candidates and faculty in the program refer to it using that prefix. The EDMS program at UGA is grounded in National Middle School Association’s initial level teacher preparation standards and the Georgia Framework for Accomplished Teaching (NMSA, 1997; Georgia Systemic Teacher Education Program, 2006).

This article reflects the following This We Believe characteristics: Meaningful Learning — Multiple Learning Approaches — School Environment
Candidates in the program choose two content area specializations from language arts, mathematics, science, and social studies. Courtney chose social studies and language arts, and Mary chose science and math. EDMS candidates take courses in arts and sciences related to their two areas (e.g., English, history, physics, and mathematics). They also take content pedagogy courses within the college of education—courses that combine knowledge of specific content with how to teach that content effectively with and for young adolescents.

The EDMS program centers on a series of three methods courses, each with an associated field experience or internship. The candidates spend more than 830 hours working with young adolescents and their teachers in grades 4–8 in elementary and middle schools in 10 school districts.

A conceptual framework (Pate & Thompson, 2004) and related essential questions (Andrews & Thompson, 2007) guide the program’s vision for who preservice teachers, such as Courtney and Mary, should be as educators of young adolescents (see Figure 1). The framework and essential questions are built on the belief that meaningful classroom curriculum, instruction, and assessment are influenced by and dependent on multiple factors—none of which can stand alone, and all of which are necessarily intertwined. These factors, or circles of influence, and the related essential questions include

- The teacher (“Who am I as a professional educator?”)
- Students (“Who are my students and why does it matter?”)
- Standards (“What do I need to know about standards to engage every student in meaningful learning?”)
- School and community contexts (“What do I need to know about my school and community contexts to engage every student in meaningful learning?”)

Within the teacher circle of influence, teachers may examine their beliefs about teaching and learning, assess their knowledge of content, study effective teaching practices supported by research, and consider the roles and responsibilities of effective middle grades educators. The students in the classroom also influence curriculum, instruction, and assessment in that their varied interests, needs, strengths, prior knowledge, cultural backgrounds, and challenges can (and should) impact the focus of the curriculum and how the teacher organizes it, the selection of instructional strategies for teaching the curriculum, and the types of assessment the teacher uses to assess the students’ understanding of the curriculum.

Standards represent a third factor affecting curriculum, instruction, and assessment. An effective middle grades teacher must be well versed in academic standards and know how to use these standards to engage every student in meaningful learning. Standards include those adopted by the state, which, in our case, are called the Georgia Performance Standards (GPS), and those standards put forward by national content area associations (e.g., National Council of Teachers of Mathematics). The fourth circle of influence is context,

Figure 1 Conceptual framework for teaching

Pate, E., & Thompson, K. (2004)
specifically, the context of the classroom, school, and community. For example, being knowledgeable about the community’s members, resources, organizations, problems, advancements, and issues can be critical when considering how to make content standards relevant to students’ lives.

**Focus on poverty**

Through classroom observations of preservice teachers’ lessons and from reflective discussions in EDMS methods courses, we found that many candidates in the cohort that included Courtney and Mary were struggling with the context component of the conceptual framework, specifically, with issues related to poverty.

In the field experiences connected to EDMS methods courses, preservice teachers have the opportunity to work in diverse settings with students from a wide range of backgrounds. Schools surrounding the University of Georgia are comprised of students of varying races, ethnicities, religions, nationalities, and experiences. What one might not expect is that the small urban community surrounding the university has one of the highest rates of poverty in the nation for a city of its size. For their field experiences, we place our preservice candidates in 10 different districts within 40 miles of the university campus. The U.S. Department of Education designates almost all of those districts as high-need local education agencies, meaning the schools in those districts serve populations that rely heavily on free or reduced-price meal programs.

Because many of the university’s students come from middle to upper middle class backgrounds, preservice teachers like Mary and Courtney are often tested by the challenges of teaching young adolescents who live in poverty. The preservice candidates may not know how to work with the 11-year-old who is responsible for cooking supper and watching younger siblings while his parents work the night shift. They wonder how to engage single parents who work multiple jobs just to pay the rent and have little free time to monitor homework or oversee a science fair project. Additionally, they may not be aware that they need to connect and communicate differently with families who “couch surf,” moving from one extended family member’s home to another. Instead, novice teachers often make erroneous assumptions about their students’ families and blame them for their conditions and actions.

Courtney describes her initial perceptions about poverty:

*Before my first practicum in the middle grades education program at the University of Georgia, I had never experienced or devoted much thought to the effects of poverty on a community. I certainly had never imagined how a child’s learning and behaviors could be altered based on his or her socioeconomic status.*

Mary connects learning about poverty to discovering her students:

*When we first started our middle grades education cohort, we focused on discovering who we were going to be as teachers and discovering who our students really were. Most of the schools where we would be placed were lower income schools made up of students who struggle with issues of poverty. Our professors knew that poverty would be an issue that we would not only see in our students but one we would struggle with as educators of those students.*

To facilitate our preservice candidates’ examination of issues related to poverty that impact teaching and learning, we focused on two essential questions related to the program’s conceptual framework:

- What do I need to know about my school and community contexts to engage every student in meaningful learning?
Who are my students, and why does it matter?

We decided to pre-assess our preservice teachers’ understanding of issues related to poverty. Courtney, Mary, and their classmates completed a survey to gauge their knowledge, attitudes, and perceptions regarding poverty. Responses to the final survey prompt (In your opinion, how can a person get out of poverty?) revealed a simplistic and often naïve view of poverty. Almost every candidate stated that poor people could substantially improve their financial situations if they did one or more of the following: worked hard (or harder), got an education, or relied on religious faith. The candidates also identified drugs, the welfare system, and lack of motivation as major causes of poverty.

We then had candidates participate in a simulation designed to increase awareness of issues related to poverty and the experiences of people who must navigate those issues on a daily basis. The Reform Organization of Welfare (ROWEL) originally developed the “Welcome to the State of Poverty” simulation (ROWEL, 1995), and it was later revised and copyrighted by the Missouri Association for Community Action (2002).

The EDMS preservice candidates were assigned to role-play the lives of low-income adults and children (e.g., recently unemployed father, grandmother receiving social security, 2-year-old, school-age child, pregnant teenager). They received a description of the circumstances within their simulation families, including who (if anyone) had a job, their financial resources, whether they spoke English as a second language or not at all, and so forth. They experienced four “weeks” in the lives of their assigned families, negotiating a series of days during which the adults may have to get the children to day care and school using transportation tickets, report to work, leave work early to pick up a sick child, try to find health care services for the child, buy groceries, pay bills, and negotiate for other services and resources with various agencies.

Mary recounts the impact of the poverty simulation:

During the poverty simulation, we came face to face with the everyday realities of living in poverty. We were forced into a world where there was not enough time, money, and help for our families. While the two hours spent in the poverty simulation were short, those two hours impacted my thoughts and attitude in a deep and lasting way. It was not until the simulation that I realized exactly what poverty can do, not only to the parents, but also to the children in poverty. It was at that moment that I realized I was not only going to be a teacher, I was going to be an advocate for my students. The most important thing I can do for them is to empower them with a good education and stand by them as their biggest cheerleader. For me, a white female from an upper middle class home, it brought a level of understanding that I could never have gained without that experience.

Courtney echoes Mary’s insights about poverty.

Growing up in a middle class family never made me feel entitled; however, I was oblivious to the fact that several of my classmates at UGA, several of my friends even, endured issues of homelessness and hunger. After participating in a poverty simulation, it was never more obvious how difficult and challenging it was for some families to make ends meet. People who live in poverty are often unaware of the types of assistance and services available to them.

Shortly after the poverty simulation, we invited a panel of experts to speak to the preservice cohort about issues related to poverty, specifically, hunger and homelessness. Those experts shared both national and local statistics about the impact of poverty on children and families, providing the big picture as a context for the daily realities of children in northeast Georgia where UGA is located. A compilation of resources for teaching about issues of poverty appears in Figure 2.

After the panel’s presentation, the preservice candidates completed a brief needs assessment survey that we developed, Teaching Children Impacted by Poverty. The survey asked candidates to respond to the following questions:

- What questions do you have about teaching children whose lives are impacted by poverty?
- What information would be helpful to you in teaching children whose lives are impacted by poverty?
- What resources would be helpful as you teach your students about issues of poverty and how to address these issues in your community?

After reviewing the results of the needs assessment and considering the NMSA/NCATE and Georgia Framework for Accomplished Teaching standards that our candidates are required to meet, we decided to engage the preservice candidates in a service-learning project.
Focus on service-learning

Service-learning connects academics to addressing a community need, making direct associations with essential content and skills, offering multiple means for assessing student learning, and providing opportunities to make real-world connections between the standards on paper and the students who are expected to master those standards. Glickman and Thompson (2009) described service-learning as “a teaching methodology that brings the curriculum to life” (p. 14). Service-learning that ties into the mandated curriculum yields numerous benefits for students, including improving student achievement, generating more positive attitudes toward school and community, and engendering a commitment to civic engagement and awareness (Billig, 2002; Bowdon, Billig, & Holland, 2008).

Service-learning supplies preservice teachers with proven instructional practices that provide a “rigorous and relevant education based on the developmental needs of young adolescent learners” (NMSA, 2003, p. 14). Our preservice candidates soon learned that service-learning could help them achieve numerous indicators drawn from the Georgia Framework for Accomplished Teaching, including how to relate content to students’ needs.

Figure 2 Resources for teaching about poverty

Websites
UGA Cooperative Extension Service Food & Nutrition Program—www.eatwellga.com
Expanded Food and Nutrition Education Program—www.efnep.org
USDA information on food and human nutrition for consumers—www.nutrition.gov
Georgia Coalition to End Homelessness—http://www.gahomeless.net/
Kids Count—http://www.aecf.org/MinorInitiatives/KIDSCOUNT.aspx
National Child Traumatic Stress Network—Facts on Trauma and Homeless Children. www.nctsn.org/nctsn_assets/pdfs/promising_practices/Facts_on_Trauma_and_Homeless_Children.pdf
Feeding America—http://feedingamerica.org/default.aspx?SHOW_SHOV=1
National Student Campaign Against Hunger—http://www.studentsagainsthunger.org/
Poverty USA—http://www.usccb.org/cchd/povertyusa/

Children’s Literature
The Greatest Table—Michael Rosen
Our Wish—Ralph de Costa Nunez
The Lady in the Box—Ann McGovern
No Place to Be: Voices of Homeless Children—Judith Berck
Changing Places: A Kid’s View of Shelter Living—Judith Wallace, Glen Finland, & Marge Chalosfsky
Home is Where you Live: Life at a Shelter Through a Young Girl’s Eyes—Jane Herstensten
December—Eve Bunting
The Visible Poor: Homelessness in the U.S.—Joel Blaw
Beatrice’s Goat—Page McBrier
Can’t Get There from Here—Todd Strasser
Randall’s Wall—Carol Fenner
Fly Away Home—Eve Bunting
The Double Life of Zoe Flynn—Janet Lee Carey
lives, create a culturally responsive classroom, and make connections between reflection and their students’ learning. (GSTEP, 2006).

We have both taught graduate-level courses on service-learning in the middle grades and have seen our master’s and doctoral candidates develop and implement service-learning projects that have harnessed the power of both standards and students to tackle community issues of all sorts. In our graduate courses, middle grades teachers have led service-learning projects on topics such as quadratic equations with eighth graders, purposeful poetry focused on reducing bullying with seventh graders, emergency preparedness on an island with students with disabilities, environmental issues related to a local watershed with sixth graders, school beautification with recent immigrants, and history related to school segregation with seventh grade struggling readers.

To design a service-learning project, we started with the standards our preservice candidates must meet and looked for logical connections to the needs those candidates had expressed on the needs assessment survey about teaching children impacted by poverty. To meet the national and state standards and expectations addressed in our EDMS methods courses and field experiences, our preservice candidates must learn how to develop engaging, substantive, and rigorous lessons and unit plans. On the needs assessment, our candidates asked for information and resources that would help them consider how poverty affects young adolescents and their families and for instructional strategies that would help make curriculum meaningful and connected to community and to students impacted by poverty, with the idea that all children are impacted by poverty.

Along with the rest of their EDMS cohort, Courtney and Mary each worked with a team of students to develop five-day curriculum units focusing on either homelessness or hunger, two issues closely associated with poverty. Each of the nine units the students created centers on one of the Georgia Performance Standards (GPS) in fourth through eighth grade from language arts, mathematics, science, or social studies and includes an opportunity for young adolescents to engage in service-learning either during the unit itself or as a follow-up activity. See Figure 3, Service-Learning Instructional Units, for more information on these units including the standards addressed in each.

These units serve as resources to several communities, including the 2009 cohort that created them, future EDMS cohorts, middle grades educators in Georgia and beyond, and community members and leaders involved in Hands-On Northeast Georgia. Hands-On serves the local region by creating, organizing, and leading service projects that positively impact the community. Mary commented on the power of service-learning as a meaningful pedagogical approach for the cohort’s study of poverty:

After the poverty simulation, I was eager to put all that I had learned into action, and we were granted that opportunity with our service-learning units. My excitement was mixed with nerves, as I had never even planned a lesson, let alone a whole unit. The best part about this project was that I knew I would produce a tangible product that I would use in the near future. We were not making up a unit that would sit in the archives at UGA forever; we were making a unit that would be used in actual classrooms. Putting together those units was a huge step in shaping my voice as an advocate and my abilities as an educator.

Service-learning projects bring students together to address real, significant community problems and issues. photo by Alan Gaha
Developing a unit focused on either homelessness or hunger pushed the preservice teachers to examine their perceptions of poverty in light of the realities they investigated in researching content for their units. In many cases, that investigation for the unit occurred as the EDMS candidates’ practicum experiences.

<table>
<thead>
<tr>
<th>Title of Unit</th>
<th>Content Area, Grade Level, &amp; Standard(s) Addressed</th>
<th>Authors</th>
</tr>
</thead>
</table>
| Hungry for Weather                   | Science, 4th grade:  
— Students will analyze weather charts/maps and collect weather data to predict weather events and infer patterns and seasonal changes. | Joanna Beck, Barbara Bucey, Kari Scott, Ashley Shaver & Rivka Sweatman |
| A Letter to Hunger                   | Language Arts, 7th grade:  
— The student participates in student-to-teacher, student-to-student, and group verbal interaction. | Brittany Barrett, Katie Heenan, Hanna Mouchet, Katie Beth Spier, & Kimberly Zuber |
| Homelessness During the Great Depression and Today | Social Studies, 5th grade:  
— The student will explain how the Great Depression and New Deal affected the lives of millions of Americans. | Ann Clements, Elizabeth Little, Tara Marshall, Susan Minkiewicz, & Audrey Smith |
| Speaking Up for the Homeless         | Language Arts, 8th grade:  
— The student demonstrates competence in a variety of genres.  
— The student uses research and technology to support writing.  
— The student participates in student-to-teacher, student-to-student, and group verbal interactions.  
— The student demonstrates comprehension and shows evidence of a warranted and responsible explanation of a variety of literary and informational texts. | Lona Smith, Kelly Paulk, & Michael Marinacci |
| Letter to Homeless                   | Language Arts, 6th grade:  
— The student listens to and views various forms of text and media to gather and share information, persuade others, and express and understand ideas.  
— The student will select and critically analyze messages using rubrics as assessment tools.  
— The student demonstrates competency in a variety of genres | Michelle Maioli & Brittney Burns |
| Homelessness: Past and Present       | Social Studies, 5th grade:  
— Students will explain how the Great Depression and the New Deal affected the lives of millions of Americans. | Courtney Saxon, David Yancey, Holly Hammack, Paige Johnson, & Megan Waters |
| Hunger in Numbers                    | Math, 6th grade:  
— Students will understand the meaning of the four arithmetic operations as related to positive rational numbers and will use these concepts to solve problems. | Kristen Haddox, Nicole McGivern, Mary Reagin, & Katy Saye |
| Homelessness in Athens-Clarke County  | Social Studies, 8th grade:  
— The student will explain the importance of significant social, economic, and political developments in Georgia since 1970. | Taylor Andersen, Corey Baughman, Missy Howell, Ansley Johnson, & Ashley Robinson |
| Hungry for Math                      | Math, 6th grade:  
— Students will understand the meaning of the four arithmetic operations as related to positive rational numbers and will use these concepts to solve problems. | Adam Cowan, Cristina De Urioste, Stephen Morgan, Shannon Shockley, & Brenda Zickefoose |
in northeast Georgia classrooms challenged their perceptions. Courtney described her experience in a local classroom as revelatory.

Working with students who lived in an urban and poverty-stricken community opened my eyes to issues I knew very little about prior to the EDMS program. The majority of my students lived in government housing and undertook adult-like roles of caretaker, cook, and household engineer. Parental support was limited, not always due to a lack of concern, but often from financial necessity. Several parents worked multiple jobs in order to provide for their families. Investing time in their children’s education was often very difficult, if not impossible. At first, I feared that the idea of service-learning could have been perceived as offensive to the students, but after watching and understanding many of the everyday issues they endure, I was inspired and encouraged to implement service-learning in my own classroom as a first-year teacher.

Now what?

Several members of the 2009 cohort have shared the service-learning projects with local and national audiences, including the University of Georgia’s Service-Learning Showcase, National Middle School Association’s annual conference, and the National Outreach Scholarship Conference. Those presentations allowed them to get their work out to communities that could benefit from these tangible examples of meaningful instruction connecting standards and community issues, specifically issues of poverty.

Of course, the most meaningful dissemination of the work is occurring in the classrooms of first-year teachers like Courtney and Mary. Courtney is teaching fourth graders language arts, math, science, and social studies in a community west of Atlanta. Mary is teaching sixth, seventh, and eighth grade remedial math in a school 30 minutes north of Atlanta. Both of them have grounded their teaching in all they learned and experienced regarding both poverty and service-learning while in the EDMS program.

Courtney introduced her students to issues of poverty and to service-learning at the beginning of the year.

Although the demographics of my students at my elementary school are very different from the school where I student taught near UGA, their desire to serve their local community has been just as genuine and enlightening. I introduced service-learning on the very first day of school. I wrote the word “poverty” on the board and asked the kids to add their ideas about the concept to the board—what they knew, what they had seen or experienced, and what they wanted to know. Most associated the concept with laziness and believed that a lack of motivation directly caused homelessness and hunger. This was very similar to the beliefs of my fellow classmates at UGA before we were educated about poverty and the practice of service-learning.

To dissolve my fourth graders’ misconceptions, we began taking ten minutes out of our writing time to respond to prompts addressing the issues of homelessness and hunger. Over the last few months, we have addressed many facts and ideas relating to the homeless and hungry. The students have been amazed at the majority of concepts covered. They quickly decided they wanted to give back, particularly after a serious flood hit our community west of Atlanta in early September. My students saw firsthand how poverty and homelessness often result from events and situations beyond one’s control.

Rather than returning to school after a week of “flood days” feeling sorry for themselves and their friends, my fourth graders were determined to do something for others. After many class discussions, free writes, blog posts, chalk talks, and other instructional activities, the students decided that they wanted to help those in need whom they could relate to best … other students! After watching and reading news reports about the flooding and closing of a local elementary school, my students decided that they would be really upset if they no longer had backpacks or school supplies. Collectively, 20 nine- and ten-year-olds voted to develop a project called “Backpack Buddies,” a program to collect backpacks and school supplies for students and families living in local homeless shelters. Students are also collecting backpacks for families in the community who simply cannot provide such supplies for their children.

What’s next for my fourth graders? We will be studying weather to determine how natural disasters such as floods and hurricanes affect the percentage of homeless families living in the United States, and especially in Georgia. Our work will connect to two different science standards for fourth grade, one on the states of water and how those relate to the water cycle and weather and another that requires students to analyze weather charts and maps and collect weather data to make predictions and infer weather patterns and seasonal changes.
In language arts, the students will develop expository writing pieces about different causes and effects of homelessness, addressing a language arts/writing standard that requires them to produce writing that "establishes an appropriate organizational structure, sets a context and engages the reader, maintains a coherent focus throughout, and signals a satisfying closure" (Georgia Department of Education, 2006).

Our math work will connect directly to the Backpack Buddies project. The students will use decimals and number operations to calculate fund-raising goals and totals. Their work connects to two math standards: solving problems involving two- to three-digit numbers and developing further understanding of the meaning of decimals and using them in computations.

I knew I had to do a service-learning project with my seventh and eighth graders as well. The connections teachers at my school were doing a service-learning project with the March of Dimes, with the teachers involved representing health, physical education, and family and consumer science. I went onto the March of Dimes website and realized there were a lot of statistics involved and a lot of data standards that could be mastered. I sat down with my assistant principal to sketch out a three-week unit that culminated in my students presenting their work at the March of Dimes walk we would have at our school. I was floored by the enthusiasm and participation of my students. I had struggled to get them to work in groups all year, and once we started the March of Dimes project, they willingly participated in groups and helped each other out, working side by side to read through information with their peers and construct charts.

After engaging in service-learning, they seem to know, now more than ever, that you can never judge a book by its cover.

Like Courtney, Mary’s first year in the classroom centers on service-learning as a powerful and compelling way to help her struggling middle school mathematicians find the meaning in the learning.

I now teach remedial mathematics to sixth, seventh, and eighth graders at a middle school in Fulton County, Georgia. From day one, I found that my biggest struggles would be handling behavior issues and motivating my students. I wasted no time in weaving service-learning into the fabric of my classroom; I decided that I would take the unit that I constructed while at UGA and modify and lengthen it to meet the needs of my students and the standards we needed to cover. The unit I constructed was a unit that linked poverty to mathematical fractions. I was impressed by my sixth grade students’ thoughts and concerns when discussing the issue of poverty. I incorporated many different activities including reflections, reading a chapter book about poverty, drawings, as well as math manipulatives and worksheets. The students responded to the real-life applications of fractions, using fractions in their conversations and asking many probing questions about poverty. It was amazing how much the quality of students work improved during this unit compared to past units.

It took three weeks to get our projects finished. The students had to organize information into charts and graphs, and I also asked them to do a writing portion that focused on what the March of Dimes was and how certain causes of premature births affected the mother and the baby. The students also had to write letters to their fellow seventh and eighth grade students that explained what “preterm birth” was and how they could prevent it. I was very impressed with my students’ work, but I thought I was looking at the projects with rose-colored glasses until the day of the presentation came. While the other students were walking around the track, my students stood in the center of the field and presented their posters and their findings to different groups. The other teachers were amazed by the quality of the work that my “remedial” students produced. The March of Dimes representative was so impressed by their work that she is collaborating with me and with our principal to hopefully get the students to present at local March of Dimes events.

So what?

Courtney and Mary are first-year middle grades teachers, two among thousands like them who entered their very own classrooms for the first time back in August or September. So what? What difference does it make if
these two particular teachers investigate how to teach children impacted by poverty and how to use service-learning as a teaching methodology?

Courtney described the effects on her fourth grade students in response to the question: So what?

Watching my fourth graders acquire endearing qualities like compassion and generosity has been satisfying and inspiring. They are constantly searching for meaningful and personal connections to the material they are learning. Giving them an outlet to serve and give back to their own community helps them to feel like—and be—valuable and productive citizens. If my students feel engaged and connected to the curriculum, they often display a greater level of self-efficacy and concern for their education. They have also developed a great deal of tolerance for those who might be less fortunate or different. In my opinion, service-learning has inspired them to be more considerate and more thoughtful of others, focusing more on each others’ potential rather than focusing on differences. My students rarely demonstrate any discrimination or judgment of others, regardless of their socioeconomic status, race, or gender. We often discuss how important it is to welcome others’ opinions, because you never know what experiences they’ve had in life. After engaging in service-learning, they seem to know, now more than ever, that you can never judge a book by its cover.

Mary’s response to So what? addresses both the impact on her sixth, seventh, and eighth grade remedial math students and the impact on herself as a middle grades educator. Her comments demonstrate that powerful instruction really is the daily bread that feeds both the hearts and the minds of young adolescents.

It is incredible to me the quality of work that my students can produce when they are engaged with the information at hand. Some of my students have three math classes per day and are not usually looking forward to my class. But when we are researching a cause that means something to them and using it to help out the community, their whole outlook on math changes. While I thought these service-learning units would be more work for me, they ended up helping me with classroom management and with the material. The students were motivated to do the work and started coming to class on time and paying attention. I will forever be an advocate of service-learning and an advocate for my students. I am so thankful for my experience at UGA, and I know that it will resonate in my classroom for decades to come.

Extensions

How might service-learning improve student achievement, generate more positive attitudes toward school and community, and engender a commitment to civic engagement and awareness in your school and community?

What are issues in your school and community that could be addressed through standards-based service-learning projects?

References


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1. Title of Publication: Middle School Journal.
2. Publication No. 0094-0771.
3. Date of Filing: January 27, 2010.
4. Frequency of Issue: Five times a year in September, November, January, March & May.
5. No. of issues published annually: Five.
6. Annual Subscription Price: $40.00.
7. Location of Known Office of Publication: National Middle School Association, 4151 Executive Parkway, Suite 300, Westerville, OH 43081-3860.
8. Location of Headquarters of Publisher: National Middle School Association, 4151 Executive Parkway, Ste. 300, Westerville, OH 43081-3860.
9. Names and Addresses of Publisher, Editor, and Managing Editor: Publisher: Santo Pino, National Middle School Association, 4151 Executive Parkway, Ste. 300, Westerville, OH 43081-3860; Editor: David Virtue, University of South Carolina, 228 Wardlaw, Columbia, SC 29208
10. Owner: National Middle School Association, 4151 Executive Parkway, Ste. 300, Westerville, OH 43081
11. Known bondholders, mortgagees, and other security holders owning or holding one percent or more of total amounts of bonds, mortgages, or other securities: None.
12. The purpose, function, and nonprofit status of this organization and the exempt status for federal income tax purposes has not changed during the preceding 12 months.
13. Publication Name: Middle School Journal.
15. Extent and nature of circulation:
   a. Total No. of copies (Net Press Run): Avg. number of copies each issue during preceding 12 months, 29,022; actual number of copies of single issue published nearest to filing date, 24,766
   b. Paid circulation:
      (1) Outside-county paid subscriptions: Avg. number of copies each issue during preceding 12 months, 28,364; actual number of copies of single issue published nearest to filing date, 23,914
      (2) In-county paid subscriptions: Avg. number of copies each issue during preceding 12 months, 0; actual number of copies of single issue published nearest to filing date, 0
      (3) Sales through dealers and carriers: Avg. number of copies each issue during preceding 12 months, 0; actual number of copies of single issue published nearest to filing date, 0
      (4) Requested copies distributed by other mail classes through the USPS: Avg. number of copies each issue during preceding 12 months, 0; actual number of copies of single issue published nearest to filing date, 0
   c. Total paid distribution: Avg. number of copies each issue during preceding 12 months, 0; actual number of copies of single issue published nearest to filing date, 0
   d. Non-requested distribution:
      (1) Outside-county: Avg. number of copies each issue during preceding 12 months, 0; actual number of copies of single issue published nearest to filing date, 0
      (2) In-county: Avg. number of copies each issue during preceding 12 months, 0; actual number of copies of single issue published nearest to filing date, 0
   e. Total non-requested distribution: Avg. number of copies each issue during preceding 12 months, 0; actual number of copies of single issue published nearest to filing date, 0
   f. Total distribution: Avg. number of copies during preceding 12 months, 28,564; actual number of copies of single issue published nearest to filing date, 24,766
   g. Copies not distributed: Avg. number of copies each issue during preceding 12 months, 0; actual number of copies of single issue published nearest to filing date, 0
   h. Total: Avg. number of copies during preceding 12 months, 29,022; actual number of copies of single issue published nearest to filing date, 24,766
   i. Percent paid: Avg. number of copies each issue during preceding 12 months, 99.3%; actual number of copies of single issue published nearest to filing date, 99.2%
16. This statement of ownership is printed in the March 2010 issue of this publication.
17. I certify that all information furnished on this form is true and complete. April Tibbles, Director of Publications National Middle School Association
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