A historical case study of Lowell Elementary School in Missoula Montana

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A HISTORICAL CASE STUDY
OF LOWELL ELEMENTARY SCHOOL
IN MISSOULA, MONTANA

by

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presented in partial fulfillment of the requirements
for the degree of
Doctorate of Education

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Abstract

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A Historical Case Study
Of Lowell Elementary School
In Missoula, Montana

Chair: Stephanie Wasta, Ph.D.

Lowell Elementary School is located on the North side of Missoula, Montana and serves a population of around 260 kindergarten through fifth grade students. Lowell has a large transient, low income and non-traditional family population. A historical account of Lowell’s program may provide important information concerning many issues facing public education (i.e., restructuring, multiage configurations, transient populations, etc.). In 1990, Lowell implemented multiage restructuring of classrooms. Multiage and nongraded approaches closely resemble developmentally appropriate practices (Bredekamp & Copple, 1997). School improvement researchers (Conti, Ellsasser, & Griffin, 2000; Morrissey, 2000; Thrupp, 1999; National Commission on Education, 1996; Reynolds & Stringfield, 1996; Slavin, 1996; etc.) were optimistic about low socioeconomic schools’ ability to promote academic achievement.

This study examined the last 11 years at Lowell Elementary School and its organizational changes. Fifteen Lowell staff members and three MCPS administrators were interviewed. Numerous sources contributed to artifact information (e.g., attendance and transfer numbers, free and reduced lunch numbers, attendance percentage for parent/teacher conferences, and overall mean Normal Curve Equivalent (NCE) scores in reading, mathematics, and the composites).

Results of the study showed that a strong instructional leader and staff, multiage configurations, reading and math LABs using block scheduling within a School-Wide Title 1 program, school-wide expectations with conflict resolution, and the Family Resource Center were key changes and strengths. The NCE scores didn’t support the trend voiced by many of the interviewees concerning growth in student learning. Evidence of growth occurred with individualized assessments such as running records. Other trends included: a transient population (averaged 154 transfers yearly), an average of 69% free and reduced lunch count, and 89-90% parent attendance for conferences.

Schools interested in multiage approaches need to utilize assessments such as running records. They need to evaluate what is working by keeping consistent and retrievable data from year to year. A strong instructional leader with history concerning the school and knowledge about developmentally appropriate and multiage practices is also vital. This leader needs an extended tenure to follow through with his/her vision. Lowell must continue many of the changes implemented to meet the needs of its students.
Acknowledgements

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CHAPTER 1
INTRODUCTION

A key contribution to the research on educational organization has been the debate between graded and nongraded school programs. Since the school was seen as one of the social entities in which to meet the needs of the "whole" child, the debate raged between which organized program could meet the students' needs best. Those needs included academic, social, emotional, spiritual, and behavioral. Most school systems still operate under graded practices regardless of the demonstrated individual differences among children.

Noguera (1995) called for "new strategies for providing an education that is perceived as meaningful, and relevant, and that begins to tap into the intrinsic desire of all individuals to obtain greater personal fulfillment..." (p. 207). Charlesworth (1989) and Shepard & Smith (1989) supported continuous progress education (traditional grade levels do not exist and children progress as they achieve) to meet the individual differences of children. Research in education has analyzed how to best meet the individual differences in children, especially in the early grades (Bredekamp & Copple, 1997; Bozzone, 1995; Pierce, 1995; Stone, 1994; Lodish, 1992). Within the last few years, the early childhood community has reached consensus describing, "developmentally appropriate practices." According to Sue Bredekamp, director for the National Association for the Education of Young Children (NAEYC),

Developmentally appropriate practice has two dimensions: 1) it's age-appropriate
---it reflects what we know about how children develop and learn; and 2) it's appropriate to the individual child---it takes into account each child's own development, interests, and cultural background (Willis, 1993, pp. 1-2).

The NAEYC report on developmentally appropriate practices closely resembles nongraded educational elements. Some of the school improvement researchers (Conti, Ellsasser, & Griffin, 2000; Morrissey, 2000; Thrupp, 1999; National Commission on Education, 1996; Reynolds & Stringfield, 1996; Slavin, 1996; etc.) were quite optimistic about low socioeconomic schools overcoming their social class context to promote academic achievement. The findings from this case study on Lowell Elementary School could add to the body of knowledge.

All schools need to have a vision of where to go and a mission of how to get there. "Schools also need to have a clear, shared purpose for student learning, collaborative activity to achieve the purpose, and collective responsibility among teachers and students for student learning" (Newman and Wehlage, 1995, p. 51). The authors noted in a report prepared for the United States Department of Education that a number of structural conditions are needed to "increase the success of educators and parents working together to enhance school organizational capacity to improve pedagogy and student learning" (p. 52). Those structural conditions consisted of:

- shared governance that increases teachers' influence over school policy and practice; interdependent work structures, such as teaching teams, which encouraged collaboration; staff development that enhanced technical skills consistent with school missions for high quality learning; deregulation that
provided autonomy for schools to pursue a vision of high intellectual standards; small school size, which increased opportunities for communication and trust; and parent involvement in a broad range of school affairs (p. 52).

When schools are provided the leeway to initiate changes, "...efficient and effective school development is more likely to occur and be sustained when schools take responsibility for it themselves" (Cranston, 1988, p. 32). Schools need to identify the kinds of information needed for change; how to efficiently and effectively collect, present, and use the information; and organize the information for their own decision-making.

Problem Statement

Lowell Elementary School is located on the North side of Missoula, MT and serves a population of around 260 kindergarten through fifth grade students. Missoula’s North side is comprised of 58% single households with 45% of the homes occupied by their owners compared to the national percentiles of 39% and 62% respectively. Property crime (includes burglary, larceny and theft, motor vehicle theft, and arson) runs about 40 points higher (an index of 140) than the national index (an index of 100 based upon arrests per 100,000 people). Thirty three percent of the population has college level or better schooling. The median household income is under $25,000 (roughly the same as the Missoula Metro area) while the national median household income is about $37,000.

Lowell was named after Harvard professor and poet James Russell Lowell. The school was originally built in 1895 and moved to its current location in 1909. In 1935, an addition was built which allowed Lowell to become a school serving first through eighth
grades. Another addition was erected in 1960, which accommodated four new classrooms.

Lowell's current staff described the school as a unique educational setting. Lowell has a large transient, low income and non-traditional family population. With Lowell School as the only elementary school on the North side of Missoula, the staff recognized the necessity for change in order to meet their students' needs. The staff met many times to discuss the why and how of changing the structure at Lowell (see Appendix A for a listing of pros and cons to change).

After three of the staff attended the National Alternative Education Conference at Stanford University in June, Lowell's staff teamed with parents, other district personnel and University of Montana faculty to develop and implement changes. The Lowell staff attended an in-service seminar with Harbison Pool and Kathi Jenni of the University of Montana outlining a blueprint for the ideal elementary school (see Appendix B for a copy of the syllabus). In a letter to the acting Superintendent at that time (see Appendix C for a copy of the letter), Lowell laid out its research points and asked Missoula County Public Schools (MCPS) for an alternative learning class with a teacher and an aide; lower teacher/student ratios; a time-out facility with an aide to monitor it; a breakfast program; a full time counselor; a full time physical education instructor; and Modulars to accommodate growth. Lowell's goals for the 1990-1991 school year included: to increase parental involvement; to utilize a variety of instructional approaches; to use alternative behavior strategies; and to employ teaming (see the Appendix D for a copy of the objectives). These goals closely followed the key features outlined in the blueprint.
for the ideal elementary school. In August of 1990, the Learning Group Team comprised a letter to the parents of the Lowell students. They presented the following changes: establish learning groups comprised of TK1, 1st and 2nd graders in one classroom; have the curriculum emphasize many learning styles which would meet the individual needs of their students (e.g., incorporate thematic units); implement a narrative report paired with three parent conferences in order to supply a better accounting of students' progress; and provide opportunities for students to participate in additional interest areas (see Appendix E for a complete accounting of the letter). Lowell implemented an alternative, nongraded program to educate the North side population of children because the traditional graded method was not meeting the “whole” needs of their students. The Lowell program was established in the fall of 1990 and has continued to evolve over the last 11 years.

A historical account of Lowell’s program can be done to assess effectiveness, efficiency, benefits, etc., in meeting the needs of the North side student population. Lowell School appears to be a source of important information concerning many issues facing public education at this time. “According to Martinez (as cited in Surbeck, 1992) vertical (nongraded) programs cannot be fairly evaluated for three to six years after their initiation.” Lowell’s longevity in its reform efforts makes it an excellent candidate for study.

Purpose of the Study

The purpose of this study is to examine the last 11 years at Lowell Elementary School and the organizational changes it has experienced. The specific aim of the study
is to provide participants with feedback on success(es) or lack of success(es) at Lowell; possible ways to improve the school; and a realistic view or perception of the program for MCPS. Important aspects of the study will be the various participants' perceptions of changes and impacts of those changes at Lowell and if the impacts have had changes associated with self-esteem, attendance, social, emotional, academic performance, etc., in the students of Lowell.

MCPS is currently quite interested in more effective and efficient approaches to teaching students, especially nongraded alternatives. Lewis and Clark Elementary School has nongraded, multiage classrooms to offer an alternative to their student population. Other elementary schools, Mount Jumbo in particular, have also initiated "looping" practices where a first or second grade teacher will "loop ahead" with her/his class for another year. MCPS could benefit greatly from a historical perspective of Lowell given its 11 years of experience.

As a School Psychologist in MCPS, many of the author's assigned duties dealt with identifying students' individual differences within their learning environments. This position offered flexibility for observing many different school environments and student progress through these environments. These environments consisted of: preschools; graded elementary, middle, and high schools; as well as nongraded programs in and out of the public school system. One of the environments was Lowell Elementary School from 1991 through the 2000 school year. Being both a graduate student in the Doctor of Education program at the University of Montana and a School Psychologist for Sentinel
High School in MCPS presented the author with the opportunity to conduct research into various programs within the District. Staffs of many schools were familiar with the researcher, especially, Lowell. Trust and rapport with Lowell’s staff had already occurred. Thus, the position as student and School Psychologist seemed to be one as an “outside observer” of the program. Crucial to conducting this study was attaining a role as a nonjudgmental, outside observer and as an “insider to the research” (Carr & Kemmis, 1986).

*Research Questions*

The research attempted to answer the following questions:

- What changes (intentional or unintentional) in policies/programs/procedures have occurred at Lowell over the past 11 years?
- Of these changes, which have had the greatest impact at Lowell in the past 11 years?
- How have the changes/impacts been illustrated in Lowell’s students and/or faculty?
- Have the changes/impacts made a difference in attendance, the number of counseling referrals, the number and kind of discipline referrals, and overall mean Normal Curve Equivalent (NCE) scores of the Comprehensive Tests of Basic Skills (CTBS) in reading, mathematics, and composites comparing Lowell to MCPS norms?
Delimitations & Limitations

By answering the research questions, a number of benefits may be provided. Those benefits may include: gaining a better understanding of nongradeness; providing a realistic view of the program in the District; adding to the information being gathered by the District concerning alternatives; assisting the District in making funding decisions about alternative programs; pointing out the positive results of the program; providing feedback to participants and other interested parties about the program; providing possible evaluation tools for the program and pupil progress; and providing further research information to the existing research on nongraded programs, conflict resolution, school reform/restructuring, and qualitative methodology. Researchers with the Department of Education and Offices of Public Education, University Professors, and change agents would also be very interested in the findings.

On the other hand, there are some limitations with the study. Some staff members may become defensive about and resentful of the findings; the benefits of the program may be limited; negative results may be noted; the goals and objectives at the onset of the program may not be met; and the results may be applicable only to MCPS.

Lowell School has implemented many different programmatic changes in the last 11 years. These changes need investigating to determine potential strategies to be used in other elementary schools. Lowell and schools in general appear to be microcosms of their surrounding society. Whether Lowell has been proactive with its changes or reactive remains to be seen.
Operational Definitions

Authentic Assessment: The practice of realistic student involvement in evaluation of their own achievements. Authentic assessments are performance-based, realistic, and instructionally appropriate. [From: Pett, J. (1990), p. 8]

Case Study: Those research projects, which attempt to explain holistically the dynamics of a certain historical period of a particular social unit. [From Stoecker, R. (1991), pp. 97-98]

Changes: Modifications in policies, programming, procedures and structure to Lowell Elementary School deemed important by participants of the study.

Continuous Progress: A student’s unique progression through the primary program at his or her own rate without comparison of others. Retention, promotion, and assigned letter grades are not compatible with this progression. The curriculum and expectations for student performance in a continuous progress program are not linked to age or number of years in school. [From AASA’s The nongraded primary: Making schools fit children. (1992), p. 21]

Graded Education: Children grouped by chronological age, assigned to one teacher for a year, and expected to acquire in that time a specified amount of learning. [From McLoughlin, W. (1969), p. 2]

Impacts: Effects of the changes at Lowell Elementary School regarded as important by the participants of the study.

Nongraded Primary School: A school with a flexible system for grouping children together regardless of age, number of years in school, and without concern for
the grades a child is in school. Extensive efforts are made to adapt instruction to individual differences. [From AASA's *The nongraded primary: Making schools fit children.* (1992), p. 24]

**Peer Mediation:** A strategy based on mediation, a structured process in which a neutral and impartial third party (known as the mediator) assists two or more people to negotiate an integrative resolution to their conflict, and on negotiation, a process by which people who have both shared and opposing interests and who want to reach an agreement try to work out a settlement. [From Johnson, Johnson, Dudley & Burnett. (1992), p. 62]

**Portfolio Assessment:** A purposeful collection of student work that exhibits to the student, or others, her efforts or achievement in one or more areas. *Portfolios enable children to participate in assessing their own work; keep track of individual children's progress; and provide a basis for evaluating the quality of individual children's overall performance.* [From Arter, J. & Spandel, V. (1992) & *Meisels, S. & Steele, D. (1992). As cited in Grace, C. (1992), p. 1]

**Self-Esteem:** The disposition to experience one's self as competent to cope with the challenges of life and as deserving of happiness. [From Branden, N. (1994), p. 26]

**Socioeconomic Status:** Socioeconomic Status (SES) is a complex concept comprised of parental occupations, parents' educational attainment, and household income. Typically, high SES is defined as: 12 or more years of education and household income at one-and-a-half times the poverty level; while low SES is defined as: no more

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than 11 years of education and household income below the poverty level. [From Seguin et al. (1995)]
CHAPTER 2

REVIEW OF THE LITERATURE

The literature on graded and nongraded programs noted a number of factors that contribute to the debate of which organizational system is best for educating children and meeting their individual needs. Material dealing with some of these factors will be presented as it relates to this study. Those factors addressed in this chapter will include: the use of qualitative case study methodology; self-esteem; retention and social promotion; socioeconomic status; attendance and transiency; discipline and school-wide expectations and programs (Title 1, Reading Recovery, etc.); conflict and resolution; school reform/restructuring; and research on nongraded programs including cooperative learning, continuous progress, authentic assessments (portfolios), and multiage grouping.

Qualitative Case Study Methodology

Educational research is composed of complex issues that are difficult to quantify statistically. Qualitative research encompasses the analysis of human behavior and investigates the interpersonal, social, and cultural contexts of education. There has been an increase use of case study methodology in the last 10 years. Qualitative research leads to multifaceted findings beyond the original focus of the study; and the write-ups allow the reader to enter into and experience the participants' worlds (Anzul et al., 2001; Ely et al., 1996; & Flick, 1998). By using triangulation, prolonged observations in the field, and thick, rich descriptions, researchers can bolster the validity of qualitative inquiry (Creswell & Miller, 2000). Hara (1995) noted,

A qualitative research approach can be expressed comprehensively by verbally
analyzing human behavior. In this approach, the researcher is placed as a key point of research. The researcher's viewpoint is clearly placed on the research and the researcher is able to provide more richer and wider-ranging descriptions than in the quantitative research approach (p. 353).

The researcher needs to acknowledge the “lens” being used for the study as well as the assumptions of the researcher (Creswell & Miller, 2000). The qualitative research approach emphasizes the researcher’s viewpoint in the process and in the results; therefore, “it is possible to investigate the nature of human behavior and its mental dimensions” (Hara, 1995, p. 353).

The quantitative research approach pursues a neutral or “universal” value to the research. Hara explained “universal value” as “the research value is universally applicable regardless of time, place, culture and other factors. This concept is largely linked to the generalizability of research” (p. 353). However, because society has become so complex with changes and cultural differences, maintaining a neutral value in educational research has become more difficult. Ulichny & Schoener (1996) reported:

Traditional qualitative research acknowledges the centrality of rapport between researcher and informant. Most references to establishing rapport discuss the need to establish trust in the field with informants, and at the same time to remain detached and ‘neutral’ in order to avoid biasing the data collected (pp. 496-497).

Qualitative research “seeks to describe the participants’ voices rather than identify causes and predict behavior” (Gliner, Morgan, & Hannon, 1999 p. 342, supported by Collet-Klingenberg, 1998).
Many of the basic assumptions, strengths, and characteristics of qualitative research lend themselves to the problem outlined in this study (Gliner, Morgan, & Hannon, 1999; Marshall & Rossman, 1999; Collet-Klingenberg, 1998; Strauss & Corbin, 1998; Hara, 1995; Lancy, 1993; Merriam, 1988; & Yin, 1984). In particular, Yin (1984) described the unique attributes of the case study methodology. According to Yin, the case study has:

…at least four different applications. The most important is to explain the causal links in real-life interventions that are too complex for the survey or experimental strategies. A second application is to describe the real-life context in which an intervention has occurred. Third, an evaluation can benefit, again in a descriptive mode, from an illustrative case study—even a journalistic account—of the intervention itself. Finally, the case study strategy may be used to explore those situations in which the intervention being evaluated has no clear, single set of outcomes (p. 25).

Merriam (1988) stated,

"the key to historical case studies, organizational or otherwise, is the notion of investigating the phenomenon over a period of time. One still wishes to present a holistic description and analysis of a specific phenomenon (the case), but from a historical perspective" (p. 25).

The historical case study seemed to be the logical type of case study to use to explore the Lowell program in order to examine past changes over the last 11 years. Marshall & Rossman (1999) reported that case study is pragmatic in purpose and instrumental in use.
Strauss & Corbin (1998) supported qualitative research where the researcher begins with an area of study and then allows theory to emerge from data. Since Lowell had already implemented many changes, the focus of this study was to determine if the implemented changes have impacted Lowell and what trends have resulted from the data.

Self-Esteem

As mentioned in the Lowell Onward to Excellence Team letter to the Superintendent, at that time dated May 16, 1990, the team pointed out that 55% of their student population had been transient with 50% of the students coming from non-traditional families and 56% of the students qualifying for free or reduced lunches (see the Appendix C for a copy of the letter). These factors (high transiency, non-traditional families, low income, etc.) can contribute greatly to a child's self-esteem.

Branden (1994) defined self-esteem, as "the disposition to experience one's self as competent to cope with the challenges of life and as deserving of happiness" (p. 26). Branden based this definition on two premises: self-efficacy (sense of personal efficacy) and self-respect (sense of personal worth). Self-esteem is comprised of internalizations of how individuals deal with failures and the affirmative feedback from others in response to the individual's actions. According to Reasoner (2000), "the preponderance of evidence underscores the significance of self-esteem and its relationship to so many of the problems facing youth today" (p. 2). One of the factors mentioned in the Lowell Team letter was the percentage of counseling referrals in the school (59% of the student body). As Jenny Dover, a child psychotherapist affiliated with a child guidance unit in Islington North London, stated (as cited in Klein, 1993, p. 1), "for a lot of children,
school is a place where you're not validated. A huge number of them simply can’t function in big groups. It’s the withdrawn child in the big group who gets nothing." By utilizing a cooperative effort among teachers and students alike, withdrawn children, who were previously overlooked, can be attended to by one of the teachers as well as fellow students through solicitation of ideas.

Whatever the reasons or factors for the low self-esteem, educators (teachers in particular) are in a powerful position to make changes. Lowell staff recognized that their students needed Lowell to be a safe, positive and caring environment. The school climate needed to be a place where the students could be accepted for their unique abilities. Borba (1989) discussed five building blocks of self-esteem for improving student achievement and school climate (based upon field testing for six years involving 60,000 students throughout California):

- Security: A feeling of strong assuredness.
- Selfhood: A feeling of individuality.
- Affiliation: A feeling of belonging, acceptance, or relatedness, particularly in relationships that are considered important.
- Mission: A feeling of purpose and motivation in life.
- Competence: A feeling of success and accomplishment in things regarded as important or valuable (pp. 1-2).

These five building blocks have contributed to students’ increased achievement and higher self-esteem as well as enabling them to better cope with life and be more resilient to problems. Sterbin & Rakow (1996) found “that the relationship between self-esteem
and student achievement is more complex than it first appears” (p. 10). They further espoused that self-esteem has direct relationships to socioeconomic status, gender, and locus of control. These factors need to be taken into account when measuring self-esteem and achievement.

Traynelis-Yurek & Hansell (1993) reported, “self-esteem feedback can be positively affected by early intervention” (p. 146). The authors found in their study that when teachers responded positively to reading behavior, especially errors, students could recognize the effectiveness of their learning attempts. Katz (1996) also believed that “educational practices that foster mutual cooperation are also likely to foster self-esteem” (p. 65). Typically, self-esteem is thought of as part of the emotional realm. However, as noted in many of the studies mentioned previously, self-esteem transcends the academic, physical, social, and behavioral realms as well.

Retention and Social Promotion

Another factor that may contribute to low self-esteem in children is retention or social promotion. The recent literature appeared to be mixed on some aspects of retention, especially linked to academic achievement versus social promotion. Thompson & Cunningham (2000) reported that “overall, neither social promotion nor retention offers lasting advantage nor leads to high performance” (p. 1). Other research (Hauser, 2000; Karweit, 1999; and Roderick, Bryk, Jacobs, Easton, & Allensworth, 1999) all supported the idea that academic benefit of retention is temporary and costly. Pierson & Connell (1992) concluded, “that early academic difficulties tend to persist over the course of elementary school and that whereas retention does not eliminate these difficulties,
social promotion may exacerbate them" (p. 306). Yet, without support from teachers and parents in terms of motivation and additional attention to the root of the academic difficulties, retaining children may not work.

In a stronger statement against retention, Peterson et al. (1987) stated, "not only does the accumulated research fail to provide evidence that retention can be beneficial, but it suggests that retention can be harmful" (p. 108). Pierson & Connell (1992) found that retained students did not perform as well academically, compared to a random sample of nonretained classmates but performed just as well as matched-ability, nonretained classmates and better than socially promoted students. The authors maintained that,

If students who are having academic difficulties are retained or socially promoted in the absence of clear information and feedback, a sense of choice, and emotional support from parents and teachers; the students will experience all the potentially negative aspects of either retention or social promotion (p. 307).

Hauser (2000); Karweit (1999); and Roderick, Bryk, Jacobs, Easton, & Allensworth (1999), also found that new retention policies even when coupled with remediation would not lessen the cost or the negative effects of retention.

There are a considerable number of studies on retention verses social promotion, retention and academic achievement without affective variables, retention and affective variables without academic achievement, etc., all of which have produced negative effects (Thompson & Cunningham, 2000; Roderick, Nagaoka, Bacon, & Easton, 2000;
Natriello, 1996; Pierson & Connell, 1992; Yatvin, 1992; and Rihl, 1988). When a school chooses to retain a child, it should do so not only with fear and trembling, but also with a plan to make things better the second time around so that the terrible verdict it has rendered can be reversed (Yatvin, 1992, p. 86). However, most students who repeat a grade are “recycled through a program that was inappropriate for them the first time and may be equally inappropriate and of less interest to them, the second time” (Rihl, 1988, p. 4).

Retention is also expensive, in addition to being ineffective. Delidow’s (1989) longitudinal study of 166 students resulted in an awareness that 75% of all retentions occurred before third grade and one year’s retention cost increased a student’s educational expense by eight percent. According to McDonald (1991), “each student retained will cost the school system an average of $4,000.00 per year per student and $10,000,000.00 annually across the nation” (p. 74). The educational cost can be overwhelming by itself, but couple it with the cost of those students who dropped out because of retention, and the cost becomes staggering. Neill & Medina (1989) demonstrated that when a student repeats a grade, the probability of later dropping out increases by 20 to 40%. Hauser (2000) further supported this idea even when previous academic performance and relevant social characteristics were controlled.

One of the ways that education has attempted to replace retention policies is through the implementation of transitional programs such as Pre-Kindergarten, Pre-First, or TK1 (Transitional Kindergarten-First grade) programs. But as Nason (1991) noted, “transitional programs, as currently implemented do not provide a satisfactory alternative
because most research has found them to be ineffective" (p. 301). The research suggested that children who attend such transitional programs appeared to be in the top percentage of achievement scores for the first couple of years. However, their classmates eventually caught up to them around third or fourth grade.

As mentioned previously, continuous progress education, mixed-age grouping, and nongraded programs seem to be viable alternatives to retention or social promotion. Continuous progress education, where traditional levels do not exist and children progress as they achieve, is greatly supported by Tanner & Decotis (1995) and Charlesworth (1989). When the Lowell staff set out to do something about all the factors introduced in this study, they were attempting to make a change in the educational environment for those children who were felt to be “at-risk” educationally, socially, cognitively, and emotionally. The Lowell team felt the best plan of action was to turn to an alternative learning classroom. The request for change produced a nongraded program.

**Socioeconomic Status (SES)**

For the past 11 years, Lowell Elementary School has had a school population that averaged over 65% or more of their students receiving free or reduced lunches (categorized in the low SES group as defined by Seguin et al., 1995). As Wagner (1998) stated:

Socioeconomic origins do still matter, as children of white-collar workers are almost twice as likely to end up in white-collar jobs as are children of blue-collar
workers. And children from disadvantaged families are clearly more likely to do poorly in life (p. 16).

Many low SES school settings face greater problems than middle class schools. These low SES schools are often located in areas with high levels of unemployment and crime, as well as poor housing and health conditions. As a result, these schools are required to take on a huge caring role (Thrupp, 1999; National Commission on Education, 1996; Reynolds & Stringfield, 1996; and Slavin, 1996). Lowell Elementary School is located on the North side of Missoula, MT and resembles this type of low SES setting.

Prior to Lowell implementing their nongraded program, traditional educational methods were employed such as “tracking”. Friedkin & Thomas (1997) wrote: “these so-called methods (tracks) differed in the substance, pace, and standards for mastery of the material that is taught” (p. 239). Academic ability and SES influenced how individuals were placed in the tracks. The tracks also influenced educational achievement, attitudes, decisions, and peer relations (Friedkin & Thomas, 1997). With these influences, traditional methods tended to widen the inequality of learning opportunities for the low SES students. Unfortunately, students from low SES schools often brought low levels of prior achievement and were frequently disaffected (Thrupp, 1999).

Chafel (1997) reported that: “children of elementary school age or younger are cognizant of social and economic inequality” (p. 368). In order to build sensitivity toward all of society’s groups, curricular goals need to develop a positive orientation towards social class. Nongraded organizational systems recognize and plan for a wide range of pupils and abilities and ages, provide for differential rates of continuous
progress, and adjust to individual differences and emotional and social needs. All of these aspects lessen the inequality.

Absences and Transiency

As previously mentioned in the Lowell Team letter, 55% of their student population was transient. Not only does high student mobility place much stress on schools (ERIC/CUE Digest #73, 1991), it reduces the quantity and quality of education (Kozinets, 1995) and lowers student achievement (ERIC/CUE Digest #73, 1991; Kerbow, 1996; and CRESPAR, 1996). With the increased emphasis on accountability, high mobility in student populations can affect a school’s test performance. As the student population changes so does the school’s performance rating. Kerbow (1996) noted that, “stable peers are also affected by highly mobile populations” (p. 151). With many students coming and going, the curricular pace is slowed to allow for more review of the material that in turn flattens out the curriculum. Menchaca & Escalante (1995) recommended the following effective school strategies to deal with mobile populations: “low student-teacher ratios, de-emphasizing competition and grading practices, and using cooperative learning” (p. 5). Lowell’s Team letter and goals matched these aspects. School climate and staff-pupil relationships played an important part in how mobile student populations settled. Personal and family issues also influenced absenteeism (Corville-Smith, Ryan, Adams, & Dalicandro, 1998). Incorporating family support systems (e.g., family resource centers) in schools as well as development of a sense of community have been shown to decrease absenteeism as well (Fisher & Matthews, 1999).
Lowell recognized the need to increase family participation and made it one of their goals for change.

Discipline and School-Wide Expectations and Programs

Lowell School is located on the North side of Missoula, Montana. Historically, this part of Missoula has been comprised of low-income housing and transient population. At times, violence has permeated the community around Lowell School.

In 1989, 26% of the students had been referred to the principal for discipline problems involving 185 separate acts of violence. The Lowell staff recognized that their discipline plan was inadequate to deal with the problems in and out of school. As Noguera (1995) stated:

The goal of maintaining social control through the use of force and discipline has persisted too long. The rewards dangled before them [present generations] of a decent job and material wealth for those who do well in school are seen by too many as either undesirable or unattainable (pp. 206-207).

The Lowell team began to look into a school-wide approach for discipline. Fitzsimmons (1998) reported that “...in cases where school staff have significant concerns about discipline, a school-wide system may be a welcome solution” (p. 4). Ban (1986) recommended that schools look at a discipline program that involves the total school-community environment. He wrote, “it is more than just an invention for advancing discipline awareness: it is a way of ensuring discipline literacy in the school, home, and community” (p. 32). In an article entitled “School-Wide Behavioral...
Management Systems" (1997), common features of school-wide systems of behavioral support were identified. Those features included:

Total staff commitment to managing behavior; clearly defined and communicated expectations and rules; consequences and clearly stated procedures for correcting rule-breaking behaviors; an instructional component for teaching students self-control and/or social skill strategies; and a support plan to address the needs of students with chronic challenging behaviors (p. 1).

The Lowell staff developed a school-wide discipline plan that included the following elements: student behavior expectations were clearly defined, discipline procedures were implemented consistently, appropriate behavior was taught and practiced, student behavior was monitored, positive behavior was recognized, a continuum of consequences for problem behavior was established, regular feedback to staff and students on outcomes was provided, administration and support personnel supported the staff, and families were involved through the introduction of a discipline handbook. Students were reinforced for appropriate behavior through school-wide campaigns (e.g., rewarding them prizes in the shape of feet with the behavior and consequence noted per a “talk the talk and walk the talk” program). The “talk the talk and walk the talk” program incorporated many life skills like Lantieri & Patti (1996) suggested such as empathy and perspective taking, cooperation, problem solving, active listening, negotiation, assertiveness, responsibility, and expression of feelings in appropriate ways.
Lowell also established a Reading Recovery Program for the primary-learning students. Mounts (1996) defined Reading Recovery as "an early intervention program that identifies first grade students 'at-risk' of reading failure and provides daily one-on-one intensive instruction to bring them up to the average level of their first grade peers" (p. 4). Lowell staff interested in this program were provided the training necessary to offer students meeting the criteria assistance. Nongraded programs offered the flexibility needed to introduce and implement different types of intervention strategies into the existing organizational system.

Conflict and Resolution

Another concern of the Lowell team was research concerning the number of students who were considered to be "at risk". As mentioned earlier 26% of Lowell's students, at the time of the team letter, had been referred to the principal for discipline problems involving 185 separate acts of violence. These discipline problems involved conflicts such as "put-downs" and teasing, accessors/possession conflicts, academic work conflicts, turn taking, physical aggression, and fighting. The Excellence Team went on to request permission to implement an alternative learning class with a teacher and an aide for the 1990-91 school year. The school faculty began the nongraded program to not only cut down the number of conflicts but to instill conflict resolution strategies through a cooperative effort. Many researchers (Lincoln, 2001; Deutsch & Coleman, 2000; Jones & Kmitta, 2000; and LeBlanc, Lacey, & Adler, 2000) supported the idea of conflict resolution programs in schools.
Breitborde (1996) advocated "creating a multicultural atmosphere" by creating a community in the classroom whereby students are taught "the importance of mutual respect and peace and the values of cooperation, empathy, communication, critical thinking, planning, problem solving, and conflict resolution" (p. 372). The creation of this type of community could enhance social learning, where both parties involved benefited from the cooperative solution. Briggs (1996) noted that it is important for the staff of the school to "create classrooms that encourage social learning as part of the total learning experience (p. 63). Briggs (1996) and Burton (1990) both believed in a form of "structured cooperation" where conflict is defined by a "win-win orientation" and an opportunity for learning.

Other researchers in conflict management argued that students like settling their own problems with the help of other students, instead of teachers or principals (Bell, Coleman, Anderson, Whelan, & Wilder, 2000; Casella, 2000; Fitch & Marshall, 1999; Vatalaro, 1999; Miller, 1993; Gentry & Beneson, 1993; Araki & Takeshita, 1991). Gentry and Beneson (1993) reported that "team teaching the principles of constructive conflict management in a multidisciplinary context can be beneficial to individuals and society" (p. 72). Appropriate handling of conflict is needed for students to achieve success. By providing a warm, safe environment and by incorporating conflict resolution through a nongraded, cooperative learning setting, students could help students help themselves. When conflict resolution programs worked, the number of referrals to principals and suspensions from school appeared to drop (Bell, Coleman, Anderson, Whelan, & Wilder, 2000; and Casella, 2000).
The Lowell staff went further into conflict resolution by establishing a peer mediation program in conjunction with the Jeannette Rankin Peace Center. As per Johnson, Johnson, Dudley, & Burnett (1992), Lowell trained a number of older (fourth and fifth grade) students to serve as peer mediators. The authors also note that an offshoot of peer mediator programs seemed to be that the peer mediators benefited more from the experience than the disputants. With this in mind, Lowell staff decided to train as many of the older students as possible.

School Reform Restructuring

The Lowell staff wanted an approach to teaching in which the whole school was responsible for meeting the diverse needs of the student population. Looking at past standardization scores on the California Tests of Basic Skills (CTBS), Lowell consistently had low overall student achievement compared to the rest of MCPS' elementary schools. A comprehensive school improvement plan was needed in which the entire staff was engaged in an in-depth study of teaching and learning processes as well as in working with those strategies to improve student outcomes. As Morrissey (2000) stated, "true comprehensive reform requires a thoughtful, reflectively adapting pace with tolerance for the investment of time" (p. 10). Conti, Ellsasser, & Griffin (2000) reported that "collectively, the restructuring studies exhibited the belief that restructuring at school sites can be effective in bettering conditions at schools, strengthening schools' capacities, bettering schools' cultures, and improving the learning of students" (p. 55). The authors also mentioned "restructuring is viewed as a process that should not be standardized for
all schools and as a systematic change or transformation with the intent of improving educational effectiveness in ways that meet the changing needs of our society” (p. 22).

As Doan-Holbein (1997) wrote, “issues of instruction and developmentally appropriate practice pose a pedagogical dilemma. Differences among individual children do not lend themselves to the lock step progression dictated by standards” (p. 561). The Lowell staff already believed those standards alone would not improve CTBS scores or assist in any other issue facing their school. The staff also thought that just changing curriculum standards was not going to take into account the diverse student population at Lowell (Informal staff meeting, spring 1995). They needed to look at a change from the traditional mode of teaching. Other researchers (Darling-Hammond, 1997 and Ediger, 1997) encouraged schools to adopt more learner-centered, system-wide changes in policy and practices. Ediger (1997) mentioned that:

Teachers should emphasize that learners in the classroom experience:

- Meaningful lessons and units of study,
- Interesting content and skills in the curriculum,
- Purpose in learning,
- Sequence in learning (relating newly acquired content with that previously achieved), and
- Balance among objectives stressed (knowledge, skills and attitudes interact and are not in isolation) pp. 35-36.

According to Cranston (1988), schools can develop efficient and effective schools by “identifying the kinds of information needed; the most efficient and effective ways in
which that information can be collected, presented, and used; and obtain and organize
that information for their own decision making" (p. 34).

Role of the Principal

Along with the appropriate information, principals are also seen as a crucial piece
to achieving efficient and effective schools. Druian & Butler (1986) noted that,

Evaluation of programs consistently mentions strong leadership [italics added] as
one of the factors contributing most to their success. The point seems to be,
however, that it is the quality of the leadership rather than the fact of the program
that makes for success (p. 15).

The principal must take a strong interest in the program through a comprehensive vision.

In addition, according to Murphy (1994),

In enabling and supporting teacher success, principals in schools engaged in
fundamental reform endeavors often perform five functions:

• Helping formulate a shared vision,
• Developing a network of relationships,
• Allocating resources consistent with the vision,
• Providing information to staff members, and
• Promoting teacher development (p. 96).

Newman & Wehlage (1995) stated, “schools need to have a clear, shared purpose
for student learning, collaborative activity to achieve the purpose, and collective
responsibility among teachers and students for student learning” (p. 51). They
recommended the following structural conditions:
- Shared governance that increases teachers' influence over school policy and practice.
- Interdependent work structures, such as teaching teams, which encourage collaboration.
- Staff development that enhances technical skills consistent with school missions for high quality learning.
- Deregulation that provides autonomy for schools to pursue a vision of high intellectual standards.
- Small school size, which increases opportunities for communication and trust.
- Parent involvement in a broad range of school affairs (p. 52).

By incorporating these conditions, schools can "increase the success of educators and parents working together to enhance school organizational capacity to improve pedagogy and student learning" (p. 52). The Lowell staff believed that they had to get parents involved more in their children's education and set this idea as one of their goals for the 1990-91 school year.

Parental Involvement

Sullivan (1998) advocated parent involvement in schools and stated the following:

Increased parent and family involvement leads to greater student performance.

The National PTA Report recommended that parents, educators, and community leaders work together in a cohesive way to implement the following standards:

- Regular communication between home and school,
- Support in parenting skills,
• An emphasis on assisting student learning,
• The promotion of volunteering at school,
• Parent involvement in school decision-making and advocacy, and
• Collaborations with the community to provide needed resources (p. 43).

The Lowell staff recognized this need and asked the District to develop and implement a Family Resource Center (FRC). The FRC seemed vital to the Lowell staff in order to facilitate more parental involvement. They did this by implementing the following steps recommended by the National PTA (as cited in Sullivan, 1998):

The following steps outline a process for improving parent and family involvement and student success:

• Create an action team (reach common understanding and in setting mutual goals),

• Examine current practice through surveys,

• Develop a plan of improvement that includes activities that relate to each standard,

• Develop a written parent/family involvement policy that includes a vision, mission statement, and foundation,

• Secure support, both financial and emotional,

• Provide professional development for school/program staff including several opportunities to explore issues, work together, and monitor and evaluate progress, and
• Evaluate and revise the plan through continuous improvement and long-term success commitment (p. 43).

According to records kept by the staff of the FRC, the Center brought more parents into the building to access resources and services and held family functions that reinforced the bond between home and school (see Appendix F for a copy of the records).

**Nongraded Programs**

The Lowell team implemented the nongraded program slowly with one alternative learning class at the onset. The research on effective nongraded programs has grown in recent years as studies have been conducted comparing nongraded and graded schools. Nongraded programs were not just a methodology of meeting individual differences demonstrated by children; they were a philosophy of education that more and more educators were adopting. Aksoy (1998) reported that the elementary education experience needed to make some changes to address the new characteristics of American life. Many of the attributes of a nongraded program such as individually guided education and cooperative learning through interdisciplinary methods could address these new characteristics.

Pavan (1992) listed five different outcomes in a review of the research studies published between 1968 and 1990. Those five outcomes are summarized below:

- Studies provided a consistent pattern favoring nongradedness;
- The nongraded groups performed better than the graded groups on measures of academic achievement (58%); and the nongraded groups performed as well as the graded groups on measures of academic achievement (33%);
• Studies indicated nongraded schools as better for students on mental health and school attitudes (52%); and studies indicated nongraded schools as similar for students on mental health and school attitudes (43%);
• Benefits increased as children experienced nongradedness longer; and
• Blacks, boys, low SES level students, and underachievers benefited from a nongraded program (p. 23).

As Howard and Bardwell (1966) wrote almost forty years ago, “some administrators may wish to begin by encouraging 'creative islands' in the faculty to plan a pilot project” (p. 46). But as Pavan (1992) wrote:

The 1960s and 1970s were a time of high interest in nongraded schooling. Goodlad & Anderson's revision of the Nongraded Elementary School in 1963 provided the rationale for schools attempting nongraded programs. That book was revised again in 1987; marking a new period of interest in nongraded programs (p. 22).

Like many other educational debates, the pendulum of changes makes its way both right and left of center, and educators rarely stop to realize that there are facets of effectiveness that can be utilized from both sides. Goodlad & Anderson (1987) cited many studies that analyzed the effectiveness of nongraded schools (Pavan, 1977; Pavan, 1973; McLoughlin, 1972; McLoughlin, 1970; McLoughlin, 1969; and DiLorenzo & Salter, 1965). Pavan (1992) again looked at the research on nongraded schools from 1969-1990 and found that “the 64 research studies cited in this review clearly support the
use of nongraded/continuous progress programs” (p. 25). The Lowell staff believed that the nongraded program would assist them in meeting the whole needs of their students.

Nongraded programs provide alternative answers to many questions: 1) should we retain or socially promote children; 2) should we ability group either by between-class ability grouping (e.g., high, middle, and low self-contained second grades) and/or within-class ability grouping (e.g., reading groups); 3) how do we solve the problem of split grades (e.g., 25 and 38 students in each of two grades of two and three); and 4) how do we incorporate developmentally appropriate practices? In order to really analyze and synthesize these rationales for nongraded programs, one needs to have an idea of what nongraded education means. Gaustad (1992) defined nongraded education as:

The practice of teaching children of different ages and ability levels together, without dividing them (or the curriculum) into steps labeled by grade designations. Children move from easier to more difficult material at their own pace, making continuous progress rather than being promoted once per year. Curriculum and teaching practices are developmentally appropriate. Integrated curriculum fosters children’s physical, social, emotional, and intellectual growth (p. 2).

In June 1990, the State of Kentucky passed the revolutionary Kentucky Education Reform Act that identified seven critical attributes of an effective (nongraded) primary school program.¹ Those seven critical attributes were as follows:

- Developmentally appropriate educational practices;
• Multi-age and multi-ability classrooms;

• Continuous progress;

• Authentic assessment (assessment that occurs continually in the context of the learning environment and reflects actual learning experiences that can be documented through observation, anecdotal records, journals, logs, work samples, conferences, and other methods);

• Qualitative reporting methods;

• Professional teamwork (refers to all professional staff who communicate and plan on a regular basis to meet the needs of groups as well as individual children); and

• Positive parent involvement (p. 264).

However, in an article titled Evaluation of the Primary Program in Six Kentucky Schools (1998), not all schools had implemented a continuous progress primary program. The task in front of leaders at Kentucky schools continued to be bringing teachers' beliefs in line with the underlying philosophies of nongraded programs. “In spite of these obstacles, the Kentucky reform effort has perhaps had greater success than most reform efforts because it does address the entire system” (p. 20). The efforts so far could lead to continued growth in creation of comprehensive school systems that assist students to become knowledgeable and thoughtful human beings.

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1 Source: Primary Thoughts: Implementing Kentucky's Primary Program. Kentucky Department of Education. Thomas C. Boysen, Commissioner.
**Authentic Assessment**

Since the Lowell staff decided to implement a nongraded program, authentic assessments were also considered, developed, and implemented in the form of narrative reports. Bergen (1993) defined good authentic performance as having three qualities:

- It is integrative, measuring many facets simultaneously;
- It is applied, having the complexity of real world roles; and
- It may be individual, but is often group-based and the performance of every group member is essential for success as both individual and group performance effectiveness is evaluated (p. 99).

Authentic assessment comes from the "outcome" model of assessment that gives information about what children have actually learned and can demonstrate. One form of authentic assessment is the portfolio. "Portfolios are collections of student work representing a selection of performance. Portfolios are useful as a support to the new instructional approaches that emphasize the student's role in constructing understanding and the teacher's role in promoting understanding" (Sweet, 1993, p. 1). Sewell, Marczak, and Horn (1997) stated:

- Portfolio assessment has become widely used in educational settings as a way to examine and measure progress, by documenting the process of learning or change as it occurs. Portfolios extend beyond test scores to include substantive descriptions or examples of what the student is doing and experiencing (p. 1).
- Portfolios with narrative reports were to be more personal, less competitive, and conveyed more information to parents (Dennis, 1997; Hannon, 1997; and Hall, 1990). Portfolios also invited parents to become partners in their children’s learning. DeFina
(1992) stated that, “empirically, teachers can see that students who use portfolios are more involved in their learning. Portfolio teachers also feel that they are more in touch with their students’ needs…” (p. 65). “They can also be used to support cooperative teaming by offering an opportunity for students to share and comment on each other’s work” (Sweet, 1993, p. 1).

Cooperative Learning

Cooperative learning allows interactions and investigative experiences through a group process. Androjna, Barr, & Judkins (2000) stated that when:

The following solution strategies were implemented: teaching of social skills, creating a cooperative classroom through the use of cooperative learning activities, teaching of conflict resolution techniques, instituting open meetings, and implementing classroom expectations that foster a caring classroom; the intervention had a positive impact on peer relationships and the students’ ability to work cooperatively in groups (p. 68).

It benefits academic and social skill development, is worthwhile and motivating for educating students, fosters development of interpersonal skills, enhances self-esteem, creates positive attitudes toward learning, and improves race relations (Hendrix, 1996; Zachlod, 1996; Johnson & Johnson, 1993; Hillkirk, 1991; Slavin, 1990; and Johnson & Johnson, 1989a).

Mills & Durden (1992) simply defined cooperative learning as “students working together on a school-related task” (p. 13). The authors reviewed many of the issues and studies surrounding cooperative learning and ability grouping. From their conclusions,
either of these practices utilized alone or together, coupled with appropriate use were both beneficial educational practices. They went on to state that: “the debate over which is better—cooperative learning or ability grouping—is diverting our attention away from the acknowledgment of individual differences…” (p. 15).

Cooperative learning is more than an instructional procedure; it is an organizational structure referred by Johnson & Johnson (1993) as “the cooperative school.” “Students work primarily in cooperative learning groups, teachers and building staff work in cooperative teams, and district administrators work in cooperative teams” (p. 65). “Katz and others, found that participating in mixed-age groups has social and cognitive benefits for both older and younger children: cooperative prosocial behaviors increased and discipline problems were reduced” (Gaustad, 1992, p. 3). Cooperative learning has also been an effective tool and appropriate developmental practice. Johnson & Johnson (1993) stated, “cooperative learning is more than an instructional procedure. It is a basic shift in organizational structure that extends from the classroom through the superintendent’s office…” (p. 66). Cooperative learning is an effective educational tool with students and can decrease the feelings of isolation and uncertainty of teachers by providing support for one another. The Lowell team, with or without knowing, used this organizational thinking to start the nongraded program.

Continuous Progress

To counteract the harmfulness of retention and/or social promotion, Lowell School established continuous progress as part of its alternative program. Grant & Richardson (1996) noted that, “it (nongradedness) provides for the continuous, unbroken,
upward progression of all pupils, the slowest and the most abled” (p. 187). Continuous progress means that students will progress through the primary (and in some cases, intermediate) school programs at their own rate without comparison to others. Retention, social promotion, promotion, and assigned letter grades are not compatible with this progression. The child’s age and number of years in school has no link to the curriculum and expectations for student performance in a continuous progress program. Continuous progress is used to provide students with the most appropriate learning experience through adjustments and accommodations in the students’ learning environment. Students may take two or three years to progress through the primary grades.

McLoughlin (1969) advocated that an examination of the provisions nongraded schools make for individual differences involve a study of the rate at which students progress through the primary (and if applicable, the intermediate) program. Continuous progress education frees teachers and school systems from an arbitrary timeframe. Students progress through the curriculum at their own rate and the words “pass and fail” have no relevancy.

**Mixed-Age Grouping**

Another facet of nongraded programs is mixed-age or mixed ability grouping. Nongraded programs with continuous progress, by their definition, will most certainly have mixed-age or mixed-ability groups. Lauer (2000) reported that:

- Effective implementation of multi-age programs requires: extensive planning and preparation that includes stakeholder input; district understanding and support to help teachers make complex instructional changes; support from administrators.
for the creation of learning communities; adequate resources including classroom materials, planning time and staff development; and teacher collaboration that is facilitated by principals (p. 37).

Programs that involve multi-age grouping, continuous progress, cooperative learning, etc., need to have input and time to develop such programming changes for them to work (Lauer, 2000; Kasten & Lolli, 1999; Little & Dacus, 1999; and Lloyd, 1999). The flexible grouping “encompasses a two-to four-year span, allowing movement between levels for those pupils ready to advance or needing more help in a subject” (Cohen, 1990, p. 21). Katz, Evangelou, & Hartman (1990) stated, “when you combine the evidence from cross-age studies, mixed-ability grouping, and cooperative learning literature, you’ve got a super case for mixed-age grouping” (p. 65).

One rationale for mixed-age grouping argued that it is more reflective of the society in which students live. Another rationale offered revealed that mixed-age grouping tends to meet the needs of individuals and draws forth contributions from each individual. Anderson & Pavan, (1993) noted that the majority of studies on mixed-age and nongraded programs found that students generally performed better academically and were healthier mentally. Lodish (1992) described four misconceptions associated with mixed-age grouping:

- Multi-age vertical groups are less structured than single-grade horizontal ones---tightness of structure is more of a teaching organization and style than grouping;
• Mixed-age classrooms are meant to equalize (tracking by ability or age) children of different ages and abilities—instead they offer a chance for these multi-age/multi-ability groups of children to work together;

• Younger children will be “stretched” more than in a single-grade class—older children “teach” newly learned skills to younger classmates and they strengthen their own understanding; and

• Once children begin a multi-age class in the younger of two grades, they must stay with the class for the second year—teachers discuss each child and determine the most suitable placement for the following year based on individual student needs, interests, temperament, and learning styles (p. 21).

As Surbeck (1992) mentioned, “clearly, the multi-age grouping approach is a part of a much broader change in education... it is a step forward on a path toward a more effective educational experience for every child” (p. 4).

Nongraded organizational systems recognize and plan for a wide range of pupil abilities and ages, provide for differential rates of continuous progress, and adjust to individual differences and emotional and social needs. Lowell School is not the only MCPS School to incorporate nongraded classrooms. Lewis and Clark Elementary School also implemented nongraded, multi-age alternatives; however, Lowell’s program has been in place since the 1990-91 school year. MCPS is interested in obtaining information about the effectiveness of alternative programs. Lowell is the logical place to start the
research because of its longitudinal perspective and 11 years of experience. It is clear that continued research into the effectiveness of nongraded programs is needed to better assess the role these programs play in educational organizations.
CHAPTER 3
RESEARCH DESIGN AND METHODOLOGY

This study incorporated a historical point of view looking at the Lowell School program from the 1990-91 school year to the present. As Merriam (1988) stated:

Historical case studies have tended to be descriptions of institutions, programs, and practices as they have evolved in time. Historical case studies may involve more than a chronological history of an event, however. To understand an event and apply one's knowledge to present practice means knowing the context of the event, the assumptions behind it, and perhaps the event's impact on the institution or participants (p. 24).

Lowell School had a rich history of information ripe for exploration and examination.

Gay (1992) stated,

Historical research is the systematic collection and objective evaluation of data related to past occurrences in order to test hypotheses concerning causes, effects, or trends of those events that may help to explain present events and anticipate future events (p. 205).

The design attempted a triangulation approach featuring numerous artifacts and interview questions and answers with Lowell staff and MCPS administrators. The artifacts included attendance records and transfers in and out of Lowell, percentages of attendance by parents at parent-teacher conferences, free and reduced lunch count percentages, the number of kind of discipline incidents and referrals (when available), the number of counseling referrals (when available), Stanford Reading Achievement (SRA),
Comprehensive Tests of Basic Skills (CTBS), and Iowa Tests of Basic Skills (ITBS) changes in the mean Normal Curve Equivalent (NCE) in total reading, mathematics, and composite scores of Lowell and the local levels of MCPS from 1990-91 to 2001-2002 school years. A series of 10 questions were asked participants concerning changes and impacts at Lowell (See Appendix H). Trends were examined and discovered in the artifacts and answers to the interview questions. A brief-time line of the implemented changes at Lowell is represented below:

**Figure 1**

| Team Visits Stanford University & Partnership with St. Patrick’s Hospital Starts | |


| 2001-2002: Primary Classrooms Drop PM Recesses |

In July of the 1989-1990 school year, the Missoulian featured an article about Lowell and the school's desire to make changes to its program. In the article entitled "Lowell Talking Change" (1990), the principal noted that Lowell's standardized scores were 20 percent lower than the district average.
The Lowell staff realized the necessity for change. Four different principals as well as four different central administrators were associated with either Lowell or MCPS during the 11-year span. Primary sources identified and used as the basis of the triangulation include: attendance records and transfers in and out of Lowell, parent teacher conferences percentages, free and reduced lunch count percentages, the number and kind of discipline incidents and referrals (when available), the number of counseling referrals (when available); SRA, CTBS, and ITBS changes in the mean NCE total reading, mathematics, and composite scores of Lowell and the local levels (MCPS) from year to year over the 11 years; and answers to interview questions from the Lowell staff and MCPS administrators.

Participants & Sites

Lowell Elementary School implemented an alternative nongraded program as well as many other programmatic changes to educate the North side population of children in Missoula, MT because the traditional graded method of education was not meeting the needs of the “whole” child. The following participants and sites were selected for the study:

- The staff of Lowell School (those who have been or had been at Lowell for six or more years from the 1990-91 school year to the present and who had not been away from Lowell more than two years),
- The Central Administrators (where available) of MCPS involved with the onset and subsequent development of Lowell.
Current and past staffs and administrators were included as the primary focal points of the study. The staff at Lowell is currently comprised of 25 teachers, one principal, one secretary, and four specialists (librarian, counselor, physical education, art, etc.). In addition, three teachers have been retired for less than three years. The number of individuals available, those who have been or are still at Lowell for six or more years and have not been away from Lowell for more than two years is 18. Of those 18 individuals, 15 were available for interviews (in regards to the other three, one could not be contacted, one declined, and one was unavailable for rescheduling). Thirteen certified staff and two classified staff made up the 15 individuals. Many of these individuals hold masters degrees in one form of education or another (reading, administration, etc.) and have an average of about 18 years of teaching experience.

Of the eight administrators who had or have information about Lowell, five administrators were contacted to participate in the study. Of these five administrators, three were interviewed (two were principals, one of which taught at Lowell for the first two years of the 11-year span, and one was a central administrator). Of the original eight administrators, one of the principals passed away and the other two have been away from Lowell for more than 6 years. One central administrator declined to participate because of lack of personnel knowledge concerning Lowell and the other central administrator knew Lowell in a global sense involving Title 1 services and assessment only. All personal information (names, statements, perceptions given, etc.) of the participants was held in the strictest of confidence.
Hatch (1995) suggested that:

A clear description of the qualitative approach should be provided to stakeholders prior to beginning the evaluation and detail the narrative nature of qualitative data through the following six points:

- Specify evaluator's role(s) at the site(s);
- Emphasize the importance of understanding participants' constructions relative to effectiveness;
- Define the process for translating raw data into findings and evaluative conclusions;
- Indicate the large amount of time necessary for data collection, analysis, and interpretation;
- Stress ethical concerns about interactions in the settings and using data; and
- Explain the open and flexible nature of qualitative evaluative designs (p. 194).

A summary of the research was provided to all participants upon completion of the study.

Procedure

The study made an effort at triangulation in gathering the information via interviews with certified and classified staff at Lowell, interviews with administrators affiliated with Lowell and the central MCPS office, and artifacts. Information was recorded through the use of: 1) transcribed answers to interview questions asked of the participants along with any follow-up information needed based upon the transcriptions and 2) collected artifacts including attendance records and transfers in and out of Lowell, parent teacher conferences percentages, free and reduced lunch count percentages,
discipline referrals (both number and type), counseling referrals (number), SRA, CTBS, and ITBS NCE scores of Lowell and MCPS over the last 11 years. "The qualitative researcher's most effective defense against the charge of being subjective is to buttress what one has observed with material that reinforces these observations from other semi-independent sources" (Lancy, 1993, p. 20). Transcriptions were analyzed for major trends as well as specific examples. The artifacts were analyzed for supporting trends in the categories supplied by the interview answers.

Letters of permission were sent to the Superintendent of MCPS and the principal of Lowell School spring of this school year (2001-02) (see Appendix G for copies of the letters). Upon receiving written permission from the University of Montana Review Board (see Appendix H for a copy of the research exemption form) and MCPS, the study commenced. The individuals selected who agreed to participate in the study were asked the interview questions through a tape-recorded, face-to-face method. By agreeing to participate in the study, the participants agreed to be tape-recorded. Interviews were scheduled prior to collection of artifact information. Participants' identities were randomly matched with numbers one-30 to assist with confidentiality. Follow-up sessions were conducted with some of the participants once preliminary information was transcribed, categorized, and analyzed. Three follow-up sessions were conducted with one of the participants in a face-to-face manner and checked for accuracy of information and asked for clarification of the information. The transcribed information was stored in a locked file cabinet at the researcher's office. The tapes used during the interviews were
erased after the study was completed. Analysis of the transcribed information was completed utilizing the following steps:

- All of the transcriptions were read through carefully.
- Transcripts were reviewed with each of the ten questions in mind. Notes were made pertaining to answers given to each question from each transcription.
- The notes were clustered into main topics depending upon how often the topics were voiced. The topics were then defined in terms of specific trends. Similar trends were grouped into main trends.
- Transcriptions were reviewed again to supply specific examples in support of the main trends.

Main trends were consistent within almost all participants whether certified, classified, or administrative in nature. Therefore the transcriptions were analyzed together creating a group report individually done. The administrators did answer some of the questions with a more global outlook than the Lowell staff. Those differences are discussed in Chapter 4.

Overall SRA/CTBS/ITBS mean NCE scores utilizing fourth grade in reading, mathematics, and composites for Lowell and MCPS were gathered from the past 11 years. Those scores were analyzed for any trends over the last 11 years. Since Lowell's population changed from year to year due to transiency, no populations within Lowell were alike for comparison purposes. The other artifacts (attendance numbers and transfers in and out of Lowell, parent teacher conference attendance percentages, free and reduced lunch count percentages, number of counseling referrals, and number and type of
discipline referrals) were gathered to provide information about trends as well. The analysis was conducted as a simultaneous activity with data collection, data interpretation and narrative reporting as suggested by Creswell (1994).

Instrumentation

Research addressed the following questions:

- What changes (intentional or unintentional in policies/procedures/programming) have occurred at Lowell over the past 11 years?
- Of these changes, which have had the greatest impact at Lowell in the past 11 years?
- How have the changes/impacts been illustrated in Lowell’s students and/or faculty? And
- Have the changes/impacts made a difference in attendance, the number and type of discipline referrals, the number of counseling referrals and the CTBS NCE scores over the last 11 years?

In an effort to answer the above-mentioned questions, many factors were considered in the designing of the structured interview questions. Among the factors was how to compose appropriate questions and to select an appropriate question format. As mentioned in “Using Structured Interviewing Techniques” (Program Evaluation and Methodology Division Report No. 10.1.5 of the General Accounting Office, 1997): Three main criteria exist for writing appropriate questions: relevance, selection of the proper respondents, and ease of answering. Relevance is defined, as questions should be directly related to the purpose of the study and has a good probability of
yielding the kind of data desired. Selection of the respondents depends upon who will be asked what and even though a question may be relevant to the study; it may not be answerable by the people to whom it will be asked. Questions need to be relatively easy to answer and should not create embarrassment for or an undue burden on the interviewee (p. 1).

Fraenkel & Wallen (2000) recommended utilizing a standardized open-ended interview format. The authors stated, “the exact wording and sequence of questions are determined in advance. All interviewees are asked the same basic questions in the same order. Questions are worded in a completely open-ended format” (p. 511). Some strengths that standardized open-ended formats had are “respondents answer the same questions increasing comparability of responses and facilitates organization and analysis of the data” (p. 511). However, the researcher needed to be cognizant of constraints placed on respondents from the standardized wording of questions. One way to stay cognizant of the constraints was to schedule follow-up meetings to expound and clarify on previously acquired information. See the Appendix I for a copy of the structured interview protocol.

Answers to the interview questions and artifact information were analyzed and the results are presented in Chapter 4.
CHAPTER 4

DATA ANALYSIS

Lowell implemented many different changes over the last 11 years. Key changes that stemmed from the interviews with certified, classified, and administrative participants noted the following: 1) multiage classroom configurations, 2) established as a School-Wide Title 1 program, 3) reading and mathematics LABs with block scheduling began, 4) Book Nook created, 5) set up and maintained a partnership with St. Patrick's Hospital, 6) generated a Family Resource Center (FRC), 7) developed and implemented school-wide expectations for discipline purposes, and 8) leadership turnover. The key changes, impacts, and illustrations are presented in terms of the most to least amount of emphasis placed on them by the interviewed participants.

Interview Answers and Notes: Major Trends

Responses to questions one through four appeared to blend together, therefore, the answers and notes to questions one through four were listed together. Questions one through four were as follows: 1. Have you seen changes at Lowell since 1991? 2. Of these changes which have made an impact? 3. What kind of impacts have the changes had at Lowell? 4. How have these impacts been illustrated? What examples are available? Each of the answers listed below contain changes, impacts, and illustrations.

Leadership Turnover

Change.

A number of significant changes occurred at Lowell within the last 11 years. One of the biggest changes has been the amount of leadership turnover. Lowell has had four
different principals in that time (Principal A, Principal B, Principal C, and Principal D). Principal C had the longest term during the 11 years, serving for six years.

**Impacts**

Many of the certified and classified staff at Lowell noted the loss of administrative support, follow-through and consistency with discipline programming, and school vision (seeing where Lowell was going and then taking the school there). They also mentioned it was hard for the staff to maintain enthusiasm and growth in the program when administrators came and went, especially when momentum had been high through an instructional leader. One staff member summed up the concerns with, “The district hasn’t given us someone to follow through. I thought, you know we got Principal C. That principal was our best leader academically and got us going on the right track, and I thought they pulled her out too soon. They didn’t allow this program to see the growth it needed.” Certified staff members felt the need to assume the leadership role in making administrative decisions.

**Illustrations**

Interviewed participants stated confrontations existed between staff members over the assumption of the leadership role. One certified staff member said, “I don’t know who that certified staff member thinks they are making that decision.” Another certified staff member responded by saying, “What happens is you’re going okay I’ve made this decision, and I’m making decisions I have no business making and feeling comfortable making those decisions.”
School-Wide Title 1

Change

Lowell applied to the Federal Government to become a School-Wide Title 1 school in the spring of 1994. Lowell School became a School-Wide Title 1 school beginning in the fall of the 1995-1996 school year based upon the number of students who received free and reduced lunches. Monetary assistance became available which allowed all teachers to become responsible for teaching reading, initially, and later mathematics through the use of reading language arts and mathematics blocks (LABs).

Impacts

The teachers were able to provide more individualized assistance in the LABs. Special education students' needs were better met with the smaller numbers. The resource room teachers spent more time on students' progress, curriculum and instruction issues, reading comprehension, etc., instead of worrying about how schedules came together in order to see all of the students in the resource room. The School-Wide program made it possible for the LABs to have small numbers, which increased the available instruction time for all students.

Illustrations

Eight participants, including administrators, mentioned they were happier and less stressed as a result of the School-Wide Title 1 program. With the increased instruction time for all students, individual students weren't overlooked. The LAB students weren't able to hide their abilities or inabilities. Their teachers knew them very well. One certified staff member captured the essence of the participants with her statement,
"I thought there were definite positive changes there, especially in the Title 1 program. It became a school-like program, and so I felt like more of the teachers took ownership of the school, rather than just the classroom teachers. It was small in numbers of children in classes, and I felt that everybody was getting an equal amount of attention."

LABs

Changes

With the School-Wide Title 1 assistance, reading LABs were established in the 1995-1996 school year in the primary classrooms. The next year, the LABs moved up into the intermediate and fifth grade classrooms. The LABs were part of the School-Wide plan submitted to the Federal Government as part of becoming a School-Wide Title 1 School. Principal C initiated the plan with consultative services from Principal D (in charge of Title 1 services for the District at that time). The reading LABs consisted of 10 to 12 students based upon their reading levels assessed using reading recovery strategies and running records evaluations. Students were able to move from one LAB to another as their progress dictated. The LAB make-up of students changed every year. As a result of the establishment of reading LABs, resource room teachers were also afforded the opportunity to restructure their program and become a part of the LABs.

The mathematics LABs were implemented in the 2000-2001 school year within the primary classrooms. The teachers taught either a first grade level or second grade level math LAB of 12 to 15 students.
Impacts

The teachers knew where the students were academically through the use of running records done at the beginning of the school year, periodically throughout the year, and at the end of the year to see growth. All 13 certified staff members stated that students showed increases in their skills and ability levels. One certified member stated, “Any of the students in my class could be confidently matched with other district students in terms of their reading ability.” The certified members also realized the growth and differences in abilities and levels, which in turn, made them feel better about teaching. Six of the certified participants noted that parents seemed to feel more connected to Lowell because the teachers knew their children extremely well. They believed that the surrounding community witnessed the positive changes at Lowell and responded in supporting the school.

The LABs were also better suited to accommodate students with Attention Deficit Disorders. There also appeared to be less stigma attached to going to the resource room for assistance since all Lowell teachers taught a LAB.

Seven of the certified and classified staff acknowledged that students were able to provide peer tutoring within the parameters of the LABs. They stated that students felt better about themselves with this extra assistance.

One administrative comment suggested that MCPS watched what was happening at Lowell in terms of assessment (utilization of running records and reading recovery strategies) in order to improve the entire district’s assessments. Lowell was seen as a “cutting edge” school. One administrator commented,
"It gave them a leg up on the process and they certainly reflected the kinds of research that Title 1 wanted to be reflected as best practice. Pretty cutting edge stuff, still is really. The emphasis on best practices has only intensified, and I think Lowell is still ahead of the curve based on the planning they did..."

Illustrations

Many of the participants (both Lowell staff and administrators) declared that they thought teachers were able to identify students with possible learning difficulties easier and faster. Students viewed themselves as learners and risk-takers (that it was okay to make mistakes and not be afraid to try new things). The students who went on to Rattlesnake Middle School from Lowell (those that had been at Lowell for all five years) had similar or better Grade Point Averages (GPAs) than students that had been transient. Students commented on how they were able to do the assignments, read, write, do mathematics, etc. Comments such as, "I don’t like to read, or I don’t want to read, or you can’t make me read" were seldom heard. Students also asked about what they were going to read next in anticipation of reading.

The LABs impacted students’ test scores especially in the last year with ITBS. Administrators and many of the Lowell staff stated that Lowell showed the greatest improvement in scores among the elementary schools in the district (using fall to spring test scores, see Appendix J for Table 1 NCE mean scores in reading, mathematics, and composites of Lowell and MCPS). The participants also noted improvements in running record scores and the District’s Reading Assessment (DRA). First grade students attending Lowell after their Kindergarten year tested higher than previous first grade...
students utilizing running records in particular within the last two years. One administrator recalled that a sticky note charting of student scores was posted at the beginning of the 1997-1998 school year and then again at the end of the year so students, parents and staff could see the reading progress. Individuals actually saw how many kids had moved across the chart and commented, "...that's a really cool thing going on there."

Four of the certified staff commented that parents responded to them in writing to thank them for working with their children and increasing their children's self-confidence.

*Block Scheduling*

*Change*

The reading LABs existed because the District accommodated Lowell's block scheduling. The block time consists of 90 minutes of uninterrupted time in which the students are not pulled out for other activities or classes. PE, music, art and library times are all scheduled around the 90-minute block. The mathematics LABs have a similar schedule of 60 minutes of uninterrupted time. Lowell asked for the block scheduling because in the 1995-1996 school year pullouts in the primary classrooms averaged 7.3 per day and 6.8 per day in the intermediate classrooms with 7.9 per day in the fifth grades.
Figure 2

Lowell Elementary School Classroom Pullouts: 1995-1996

<table>
<thead>
<tr>
<th></th>
<th>Primary</th>
<th>Total</th>
<th>Intermediate</th>
<th>Total</th>
<th>Grade 5</th>
<th>Total</th>
</tr>
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<td>8</td>
<td>8</td>
<td>13</td>
<td>5</td>
<td>17</td>
</tr>
<tr>
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<td>8</td>
<td>12</td>
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<td>Total per Week</td>
<td>220</td>
<td>Total per Week</td>
<td>205</td>
<td>Total per Week</td>
<td>119</td>
<td></td>
</tr>
</tbody>
</table>

*Average/day/class over a 6/6/3 day period

Impacts

Almost all interviewed stated the teachers were provided with an uninterrupted amount of time for reading, writing, and mathematics instruction. Teachers had more flexibility in how to deliver the curriculum to meet the individual needs of students.

Illustrations

One certified teacher wrapped up the feeling about block scheduling when she said, “the block scheduling was necessary for that LAB set-up and also gave us a solid hour and a half without interruptions and I think that’s probably the most important thing that we ever did in terms of curriculum.” Another certified staff member added this, “So the reading LABs to me have been a very positive change, and in order to do that you have to have the block time. The block time is something that’s very important. We will fight for that block time and we won’t let them take it away because we have to have that time.”

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Multiage Restructuring

Change

All of the aforementioned changes occurred after Lowell restructured its class configurations. They went from Kindergarten, 1-2 classes, 3-4 classes and 5s to kindergarten, 1-2 classes, 2-3 classes, and 4-5 classes. The teachers found that the 3-4 combos didn’t meet the developmental needs of the students. The third graders weren’t in the same place physically, emotionally, academically, etc., as the fourth graders who were ready to take off with their learning.

Impacts

Certified staff reported that the multiage approach offered opportunities to accommodate every one of the students regardless of how transient the student had been. The LABs and combination classes allowed for students to be placed where they were developmentally and academically. Continuous progress allowed for movement when progress occurred. Certified staff also reported that the teachers tended to hold onto their students longer than other schools, exhausting all accommodations prior to referring them for specialized assistance or possible placement at a different school.

Illustrations

A certified staff member summarized multiage configurations in a few sentences, “I’ve changed grade levels you know a lot since I’ve been in the building, and I think I like what I’m doing now, which is a 2/3 combination, and I’ve always believed in developmentally appropriate education, now I’m a proponent of it. I’ll tell you, from teaching first and second, I saw where those kids come together
pretty well. I’ve taught third and fourth and there’s too much of a developmental
difference, I mean fourth grade they’re out there, they’re ready, they’ve changed
cognitively, they’ve changed their personality, their peers mean different things to
them than third graders. This is just a comfortable place for them to be.”

Revolving Door

Change

The transciency rate or as referred to at Lowell, the “revolving door”, was also
mentioned by a number of participants as a significant change. The rate has ebbed and
flowed depending upon what year is analyzed. The transfer rate varied from a high
number of 228 in 1996-1997 to a low of 102 in 1998-1999. The average number of
transfers in and out of Lowell is 154 per year (see Appendix K for Table 2).

Impacts

All interviewed mentioned because of the transciency rate, Lowell had a hard
time getting a clear standardized measure of overall school growth. The populations
changed from year to year so there was less homogeneity in the population to make
comparisons. There had been a drop in the number of families living in the surrounding
motels and at the Poverello Center (a center for homeless families).

Illustrations

In paraphrasing a couple of the certified and classified staff members as well as a
couple of administrators, the impact of transient students seemed to be two-fold: it’s
difficult to get a handle on overall academic progress when you have a 30 to 40%
turnover rate in your population in any given year and when you get so many transient
kids with gaps in their education; it's easy for others to question what's not happening at Lowell when it's really that the students have been all over the map. Another certified staff member stated when asked about the transient impact and testing, "the impact would not be seen on a district level but because of our running records, small groups, unstructured primary and intermediate programs, self-esteem, and the dedication of kids and adults."

**Book Nook**

*Change*

In the spring of 1996, some teachers visited Polson Schools to gather information about a reading library. That summer and fall, teachers worked to establish the Book Nook at Lowell where teachers could check out a series of books labeled for specific reading levels. These books not only served as primary reading stories for the students, the books also were used as supplementary materials to enhance specific skills.

*Impacts*

Ten of the Lowell staff acknowledged that the availability of leveled books increased the flexibility in how the curriculum was being delivered and how quickly students were able to progress in gaining skills and abilities.

*Illustrations*

One certified staff member summed up the feelings about the Book Nook in, "It's a richer reading program that meets more needs. We aren't stuck in a narrow focus like the basal reader. We can expand. We have the resources to do it and that's great."
SWAT & BAT

Changes

A team comprised of the principal, school psychologist, resource room teachers, Title 1 teachers, speech pathologist, and counselor created a School-Wide Assistance Team (SWAT). The SWAT was utilized to assist teachers in meeting the academic, social, emotional, and behavioral aspects of their students. In-service was provided for all the staff concerning the procedural steps needed to provide interventions, referral information, and assessments. Parents were also involved within the teams’ process of assisting students. Positive behavior plans were developed and implemented as a means of preventing and remediation of behavioral problems.

A team comprised of the principal, school psychologist, resource room teachers, general education teachers, and specialist teachers implemented a Behavioral Assistance Team (BAT) in order to assist referring teachers with discussion, development, and implementation of positive behavior plans. The plans were designed to deal with a multitude of problems ranging from inattention to tasks, impulse control issues, etc., to bullying and inappropriate contact with others (i.e., poking, jabbing, fighting, etc.).

Through the BAT, school-wide expectations were drawn up and implemented. The expectations consisted of five short statements and were thoroughly discussed and practiced with students as well as parents. Positive school-wide programs for discipline were also implemented based upon several life skills such as cooperation, problem solving, flexibility, courage, initiative, etc. Teachers utilized the curriculum and hallway, lunchroom, and playground experiences to build and enhance the life skills. Students
were positively rewarded when they were caught doing any of the life skills. At the same time, the teachers were given many opportunities for professional growth through inservices, workshops, conferences, and professional readings on behavior management as well as strategies for increasing reading, writing, and math skills in students.

**Impacts**

As a result, most children at Lowell were very familiar with the five expectations and would share them readily with new students (in one certified participant’s words, “The students could recite the expectations forwards and backwards”). Administrators and certified and classified staff members noted that the students also realized and took more responsibility for their own actions and learning. Parents were also involved in the behavior processes through informational meetings and pamphlets describing the expectations and school wide positive and negative consequences.

**Illustrations**

Staff members reported that the students were expected to and did follow the five expectations. Staff members also reported that there appeared to be less discipline problems of a confrontational nature. One of the classified staff members pointed out the benefit of SWAT/BAT by mentioning the following.

“Well, I think SWAT/BAT has an impact on classrooms because kids’ problems are brought to the forefront, and they are addressed, and there’s a solution. I think each kid is put under a microscope. We know more about our kids than I think other schools do by far.”
Instructional Strategies

Changes

Some of the participants mentioned another change that dealt with the delivery of instructional teaching. Based upon best teaching practices consistent with developmentally appropriate philosophy, instruction moved from a direct approach in teaching to a more student/learner centered approach where multifaceted strategies were utilized to meet the changing needs of the student population.

Impacts

Therefore, the students took more responsibility for their own learning. The teachers also were able to share ideas and ask for support/assistance from one another without having to worry about how they would look in front of their colleagues. Students were also questioning more about why they were learning or doing some particular activity.

Illustrations

An eloquent example of the students taking responsibility for their own learning was noted by one certified staff member, "...every child was involved and that was your job in my classroom. You are an active learner and have an active involvement in this classroom."

Early Release Time

Changes

MCPS designated each Thursday of a full five-day week for professional development (i.e., one for district level meetings/committees, one for individual school
building meetings, one for grade level meetings, and one for miscellaneous issues). In the initial years of implementing the multiage classrooms, teachers were provided early release time once a week in which to conduct common planning time with their teams (primary, intermediate, etc.). The release time was conducted differently dependent upon the principal in charge (e.g., how much direction and guidance was given inline with the proposed vision). During the last couple of years, that common planning time has been lost. Now teachers have to meet at lunch and/or before or after school with their teams for any common planning time.

**Impacts**

With the loss of common planning time, the staff has experienced less cohesiveness. The staff has taken on more responsibility for developing thematic units on their own and discussing the latest research or best practices.

**Illustrations**

Many of the participants (including certified and classified staff as well as administrators) mentioned how tiring their job was dealing with the ever-changing needs of the students on the North side of Missoula. The energy spent led to not only physical fatigue but also mental fatigue. Even with the hardships and work, one certified staff member stated, “The reason why it does continue (the program) is because people are going, ‘okay, I’m not willing to give up yet’ and ‘there’s got to be something out there to help me with this.”
Role of St. Patrick’s Hospital

Changes

In the fall of 1996, the partnership with St. Patrick’s Hospital became more involved. St. Patrick’s already provided meeting rooms for Lowell staff school improvement discussions dating back to 1989. In 1996, they began providing funding for Lowell’s summer school reading program. Students were leaving Lowell in the spring with higher reading levels than the previous fall but losing those levels over the summer due to the lack of reading practice. The summer program was established to give students extra reading practice to maintain their reading levels from spring to fall. The summer program has grown each year since its inception. Students not only maintained their reading levels but a few of them even made further progress.

In 1997, St. Patrick’s began lending one of their nurses to Lowell once a week for on-the-spot medical care, parental support, and to provide nutritional/medical/health information to classrooms and parents.

Impacts

As a result, the students who have taken advantage of the summer school program have maintained better reading levels from the spring to the fall compared to those who didn’t partake in the program.

The nurse was a physical presence utilized by students, staff and parents.

Illustration

One certified staff member described the impact of having a nurse as,
"It's great she's been able to be the liaison (between educators and parents). You can't call up and talk to somebody about saying this child's teeth need checked. She can do that; she's been doing it. She helps them to get into the dentist at the health department, making sure they have their shots. That's been a good help."

**Family Research Center**

**Changes**

In the summer and fall of 1995, Lowell established the Family Research Center (FRC). Through the FRC, the Reading is Fundamental program began. Students could go to the FRC and choose a book of their very own to have, read and share. The FRC also provided valuable community information and referral services to parents as well as adult educational information and opportunities.

**Impacts**

The staff reported that parents seemed much more comfortable about coming to school. They also believed that parents recognized that the Lowell staff had their children's best interests at heart. With the advent of multiage and continuous progress, parents were more informed of their child's progress through narrative reports and portfolio assessments.

**Illustrations**

One illustration of this impact was parents were coming into the building more and took advantage of the support and services offered at Lowell. Another illustration of this impact was an increase in new parent visits in the 1997-1998 school year; 71 new parent visits occurred as well as 59 new parents attending events.
Student Population

Changes

Class size has also changed over the last 11 years. The student population in Missoula has steadily dropped the past few years; consequently Lowell’s student population has gone from over 400 (420 in 1990-1991) to a low of 252 in 2001-2002. In the past, a number of Russian and Hmong families lived on the North side of Missoula and attended Lowell. Those populations have apparently moved to other parts of Missoula also affecting Lowell’s population size.

Impacts

The playground, lunchroom, and hallways had become less crowded making Lowell a calmer and easier place to handle.

Illustrations

Even with fewer students, there was still little room available for LABs because of all the extra programs (FRC, Early Head Start, Head Start), so LABs were housed in classrooms that have been separated into two rooms. Fourteen students and one teacher were asked to work in a small environment.

Other changes mentioned by one or two of the participants included:

- Staff turnover especially at the intermediate level, which produced less cohesiveness and more responsibility on individuals to keep the program going forward.

- The Structured Learning Program (SLP) being established in 1999 where emotionally disturbed students from the District received their assistance. As a
result, those students when mainstreamed had an impact on the group dynamics of their classrooms. There was also less space for LAB classrooms.

- Using running records and reading recovery strategies for student assessment of reading. District recognition of Lowell, its students, and staff occurred when Lowell took the initiative to start assessments with running records and reading recovery schemes.

- Community pride in the school as a result of many of the above changes as well as the Project Playground. The North side community was totally involved in the designing and building of the new playground. Consequently, the North side of Missoula took more pride in the neighborhoods and in Lowell.

- In 1999, the safer schools grant placed a counselor at Lowell providing students, teachers and parents support services as well as implementation of the District’s pilot Bullying program later that year. Children and their parents received intensive therapy utilizing many community agencies and programs which contributed to the children doing better in school and parents feeling better about their circumstances.

- Head Start and Even Start programs were brought into Lowell to assist in bringing early intervention programs into the schools. Again, loss of space for reading and mathematics LABs was the biggest impact. However, the early intervention programs did provide their children with a school-like atmosphere where older students could be used for peer buddies or assistants in the early intervention classrooms.
• In 1993, Lowell entered into a partnership with the Jeannette Rankin Peace Center and received in-service training on how to establish conflict resolution with the assistance of peer mediators or peacemakers. Students were trained how to be peer mediators as well as handle conflicts on their own without adult assistance. Many conflicts were resolved on the playground without adult intervention. Classrooms were reported by staff to be more peaceful and relaxed with fewer conflicts coming in from recess.

• The students themselves have changed in that they come to school unprepared in this building. As one certified staff member mentioned, “So unprepared that many of the kids don’t know when their birthday is, haven’t held a pencil, haven’t held a crayon, to say nothing about being read to or read to during the school year at night.”

Effects on Student Population

Lowell still had a large turnover of students each year. The percentage seemed to have dropped from around 65% to between 35-40% (see Appendix K for Table 2 actual attendance numbers and transfers in and out of Lowell from 1990-1991 to 2001-2002). There was no apparent pattern to the percentage of change in attendance numbers and transfers. A couple of certified and classified staff members and an administrator speculated that the recent Welfare Reform movement was putting more people to work which in turn changed people’s benefits. Free and reduced lunch count has managed to stay around 69% with a low of 67% to a high of 74% (see Appendix L for Table 3). Lowell continued to have a core of families who have lived in the North side and will
continue to live in the North side. Participants mentioned that the high cost of rent, no jobs available, and affordable housing on the South side of Missoula continued to contribute to the turnover rate and free and reduced lunch count.

With less student population, the playground, lunchroom, and hallways were less crowded. Students were not able to hide away in the crowds. The Lowell staff knew their students and families quite well. Students' home lives changed significantly. The two-parent families had both parents working in the current economy and the one-parent families continued to struggle, especially with Welfare Reform. As a result, the school was being asked to perform more child-rearing activities (i.e., breakfast program, free and reduced lunch program, social skills training, discipline, and even how to hold a book and turn the pages). According to Lowell staff, some parents continued to see problems that occurred at school as the school's problems and were unable or unwilling to follow-through with their children at home.

Some participants noted that the students couldn't see their future, which makes them seek out and need instant gratification. When that didn't occur, the students tended to hold grudges for longer periods of time than previous student populations. Even with the tough times, parents appeared less afraid to come into Lowell and talk. They sensed the family-oriented atmosphere and were more likely to become involved in the classroom due to the multiage approach. Lowell staff believed that parents saw how their children fit developmentally and academically. With this increase in family orientation, the North side community had become more involved and took pride in what Lowell was accomplishing.
However, Lowell teachers thought that due to the multiage and continuous progress approaches to education, students who might not otherwise have been leaders become leaders within their classrooms (peer tutoring, etc.). With this newfound leadership trait, students were learning accountability and felt a sense of belonging at Lowell. Lowell staff also felt that students felt better about themselves knowing they were in a developmentally appropriate place that accommodated their pace and progress. As one certified staff member stated, “You know, cause I teach the top level of the reading LAB in the primary, and I mean, I have them taking some pretty good risks and they’re doing it.” Less acting out occurred as well as more learning within the developmentally appropriate classrooms. Some special education students were also able to move out of replacement classes into support roles by the end of their intermediate grades. Skills could be “hammered” on harder at the early intervention levels of Kindergarten and 1-2 as a result of the LABs. One certified staff member summed up this issue in these words, “What’s really great is that starting at Kindergarten and first grade, I’m able with the early intervention we’re able to really hammer on skills.”

Changes in Student Self-Esteem

With the advent of environmental changes such as: multiage, the School-Wide Title I program, reading and math LABs, block scheduling, etc., many of the interviewed participants noted that students felt good about how well they were able to complete the amount of work expected from them. There was no behavioral evidence that students felt better about themselves, the perceptions of the participants. The students appeared to be proud of attending Lowell. Many participants had stories of running into students after
the students had attended middle or high school and the students' descriptions of their pride. One administrator had this example, "I was at the all-city track meet and two former students and their mothers were there. They came running down the bleachers and you know, just this wonderful conversation about Lowell began. How great Lowell was, and all these sorts of things." With this pride came a sense of responsibility on the students' part and they responded quite favorably. Self-appraisal, bouncing back from adversity and assuming self-responsibility were evident in the students according to the participants. These skills fell directly in line with Branden's research on self-esteem. They knew they were cared for and respected at Lowell. The students appeared more worldly and knowledgeable now. They would make statements like "I'm smarter this year" when coming back for their second year of a combination class.

Effectiveness of Impacts

Most participants stated that the multiage approaches, conflict resolution (peer mediators and peace makers), school-wide expectations, and block scheduling were effective for all students. The reading LABs seemed more effective than the math LABs although the math LABs have only been in existence a couple of years. Some of the participants noted that the multiage configuration needed to be more developmentally appropriate (e.g., the 3-4 combinations did not work as well for third graders as for fourth
graders, which was changed). Some participants also noted that the school-wide
expectations worked for about 95% of the students while the other 5% didn't seem to
impact. Most said that the multiage configurations helped the transient population since
it allowed the teachers to take students where they were developmentally. The higher
reading ability students did make faster progress than lower ability students primarily
because the lower students had further to go in their progress. As noted by one certified
staff member, "...they were so unprepared for reading and learning when they came, they
just had a long make-up to, and you know, history to make-up. They had not been read
to, they had not been exposed to literature."

Shared Feelings Among Interviewees

Most of the participants said they thought nearly everyone interviewed would
share the same feelings and thoughts about Lowell. There appeared to be a strong sense
of "we have a different job, we know we have a different job here at Lowell compared to
other elementary schools." Lowell kids were seen as valuable. Participants had a lot of
empathy for their students' situations.

Change in Staff Attitudes

Of the 18 interviewees, 16 individuals noted a positive change in their attitudes
concerning Lowell. A couple of individuals expressed a disappointing attitude in the
District's leadership and having to prove themselves as worthy of praise as educators.

Some of the participants' comments were as follows (a few noted multiage and
LABs as a general theme):
"If I have a chance to try something new, why not try it." "I love the benefits of multiage." "I don't worry about schedules with the LABs in place, my thinking has changed more in terms of improving curriculum and chunking material."

Many of the participants mentioned professionalism and importance of working relationships. "My attitude changed most because of Principal C who encouraged us to grow professionally." "I think I am a better teacher and really grew excited about what I was doing." "Teaching at Lowell has made me a multi-tasked person which I use throughout my life." "I think we have a lot of love here at Lowell and I so very much admire this staff; they give 110% all the time and that has rubbed off on the kids." "I feel affirmed by the changes working and being affirmed time and time again by what you saw, the progress of the kids, etc." "Yeah, I always admired what was happening here." "I really changed my opinion about the FRC. At first I thought 'oh great another government program, it won't work' but when I saw how they brought in Reading is Fundamental and other family oriented services, I really changed my opinion."

A couple of interviewees remarked about the lack of respect and understanding from the District. "I really don't have a very high upstanding attitude about leadership in this District because they give us hearsay 'we know what you deal with' but in reality they don't really know." "I have a jaded attitude somewhat like my kids (a show-me attitude) caused by being here too long. I don't think we've been valued for our hard work...we are accepted as 'okay' teachers."
Strengths of Lowell

Figure 3

<table>
<thead>
<tr>
<th>Strength:</th>
<th>Lowell Staff</th>
<th>Principal C's Influence</th>
<th>Multiage Approach</th>
<th>Reading LABs</th>
</tr>
</thead>
</table>

Four main strengths were evident. The staff at Lowell was the number one strength, not only for their commitment and dedication to the program changes but also to the children of the North side. The staff was described as one of the most intelligent and knowledgeable in terms of cutting edge research practices. As one of the administrators stated, "The teachers were not shy or reticent to be noted as a Lowell school teacher and a leader. As colleagues, being able to work with their colleagues from other schools in regard to assessment. They became trainers of teachers."

The second biggest strength noted was concerning Principal C. Principal C encouraged the staff to become knowledgeable through commitment and vision of what kind of school Lowell needed to be. Principal C initiated the reading LABs and fought hard for the block scheduling to operate the LABs. Principal C also instilled a purpose to assessment collection. The data that was collected through running records and Reading Recovery strategies was used to reform classroom practices. Principal C pushed for initiation of the School-Wide Title 1 program, which brought in federal dollars needed to support the reading and mathematics LABs.

Without the multiage approach being in place, the LABs would have been difficult to start. The multiage approach provided the structure necessary for teachers to place students together at varying levels for long periods of time in developmentally
appropriate classrooms. The establishment of the Book Nook made teaching in the LABs easier as well.

The reading LABs in block scheduling was the last of the top four strengths. Providing students with a 90-minute block in which to teach reading and writing has made a huge difference at Lowell.

Other strengths that were noted by some of the participants included:

- St. Patrick's Hospital support of Lowell in the beginning of restructuring with meeting rooms, financial support of providing Lowell with a nurse once a week and especially the summer school program. The summer school program allowed a number of students to maintain and grow in their reading levels from spring to fall.

- The North side children as well as the neighborhoods around Lowell were seen as strengths. They were described as resilient, learners, survivors, having no limits in terms of learning, providing support and pride and very thankful to the teachers for not giving up on them.

- The training received through the Jeannette Rankin Peace Center on conflict resolution and peer mediation making the playground a calmer and safer place.

- Implementation of the school-wide expectations emphasizing how the students do the right thing and are rewarded positively instead of focusing on the negative issues.

- Bringing in the Family Resource Center, Head Start and Even Start programs to bolster more parental involvement.
Weaknesses of Lowell

Figure 4

<table>
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<tr>
<th>Weakness</th>
<th>Administrative Turnover</th>
<th>Transiency Rate of Students</th>
<th>The Lowell School Building</th>
<th>The Need for an Even Playing Field</th>
</tr>
</thead>
</table>

Even though many of the participants were reluctant to talk about weaknesses, most all mentioned one or two issues that needed addressing. Four main weaknesses were mentioned. Those weaknesses are described below:

The administrative turnover, especially during a time of growth and enthusiasm was the leading weakness. Many participants voiced the need for a strong instructional leader with a clear vision of where Lowell was headed and who was familiar with the program, students, and families and developmentally appropriate practices. Some participants expressed concerns over the lack of administrative support and follow-through in dealing with the school-wide discipline program and the parents of students who got into trouble as well as more parental commitment. Some staff felt the need to make administrative decisions, which caused resentment among the staff. One certified staff member captured the feeling behind this weakness by saying,

"It's pivotal to have that strong, professional, 'I read this at home almost every morning' kind of leadership. Let's talk about this and try this, and some people resisted that, but Principal C kept us working. So that leadership was good and I think it's less now than what it should be."
Many participants talked about the transiency rate of the student population and how difficult it was to not only provide instruction to those students but also maintain standardized test efficiency.

The building itself had become a liability with limited space as well as needing remodeling and updating.

The need for an “even playing field” along with the rest of the elementary schools was mentioned. With Lowell’s unique problems, some staff believed that they were overlooked when the District allocated materials and extra resources (i.e., larger computer lab, common planning time, etc.).

Other weaknesses that staff stated included:

- Not to jump on too many “bandwagons” of change at the same time in order to meet the ever-changing needs of the student population. Keep what’s working and scrap the rest.

- The staff becoming worn out with the toughness of the job and dealing with the social issues of the North side population.

- Being frustrated with the lack of preparation in student teachers and having to work harder as a result.

- Holding on to students longer than necessary before referring them for assessment or possible placement in a different program or school.

**Artifacts**

Artifact information was collected from the following sources: mean NCE scores in reading, mathematics, and composites for Lowell and MCPS in SRA, CTBS, and ITBS.
tests; beginning and ending attendance numbers; percentage of change in attendance numbers; transfer numbers in and out of Lowell; free and reduced lunch count percentages; number of counseling referrals (when available); number and types of discipline referrals (when available); and parent/teacher conference attendance percentages. The information supplied by the artifacts did not provide clear evidence of triangulation of the trends noted in the interviewees' responses.

Table 1 (See Appendix J) shows a complete breakdown of the NCE scores in reading, mathematics, and composites of Lowell and MCPS from 1990-1991 to 2001-2002. In the first three years, the District used the Stanford Reading Assessment (SRA). In the 1999-2000 year, the District separated special education students' scores from general education students' scores. The District changed assessment tools in the 2000-2001 school year to the Iowa Tests of Basic Skills (ITBS). Lowell did not have a mean mathematics NCE score for the 1999-2000 year. The NCE scores didn't show any consistent trends or outright growth in terms of Lowell's progress. The group standardization tests don't seem to serve Lowell's population because of the high number of transient students (transfers in and out of Lowell averaged around 154 student transfers yearly). Lowell's populations changed radically not only from year to year but also within the same year, which created a heterogeneous rather than homogeneous grouping.

Even though Lowell's mean NCE scores had not yet risen to the District's mean levels, Lowell had made strides in student learning utilizing individualized assessments such as running records. As one certified staff member commented,
“As you know I’m in Title 1, but last year when we looked at the data, the progress that our kids have made from the beginning of the year, you know we did the assessment [using running records], and the end of the year assessments, for the first time our progress was higher than the District average.”

Table 2 (See Appendix K) shows the beginning and ending attendance numbers, percentage of change in attendance numbers from the beginning of a school year to the end of that school year, the number of transfers in and out of Lowell from 1990-1991 to 2001-2002 and transiency rate (percentage range). Lowell’s student population had fluctuated and had steadily dropped every year during the 11 year period; however, the transfers in and out of Lowell did not show any apparent connection to percentage changes in the attendance numbers (e.g., in 1994-1995 Lowell had one of the largest percentage changes in attendance but one of the lowest amounts of transfers and in 1995-1996 Lowell had the smallest percentage change in attendance but one of the largest amounts of transfers). The large numbers of student transfers in the 1995-1996 and 1996-1997 school years may have been from the Russian and Hmong populations moving to a different section of Missoula. The transiency rate also fluctuated from year to year with a high of 69-71% in 1996-1997 to a low of 27-29% in 1993-1994. The average transiency rate varied between 46.8 and 48.5%. After two consecutive years of dropping (1997-1998 and 1998-1999), the transiency rate has climbed back over 55%.

Table 3 (See Appendix L) shows the percentages of how many students qualified for free and reduced lunch at Lowell from 1990-1991 to 2001-2002 school years. Lowell
showed that an average of 69% of the student body qualified for free and reduced lunch during that 11-year span. The percentages ranged from 67 to 74 percent.

Table 4 (See Appendix M) shows the number of counseling referrals, number and types of discipline referrals (both when available) and percentages of attendance at parent/teacher conferences (as calculated at the November parent/teacher conferences). Unfortunately, records were not available or were too incomplete to provide adequate information for analysis in regard to counseling referrals and discipline types and referral numbers. Lowell staff started the changes to Lowell in the 1990-1991 school year and had information available during that time (215 counseling referrals and 95 discipline referrals through 185 acts of violence); since that time, the data had become unavailable or lost. As one administrator noted,

"Once we got that [clear vision] later on, that was easy to drive where you're going to go and stay on it. But initially when I was a teacher, for whatever reason, we didn't have that. I think unfortunately, since we didn't, some of that early information is lost, which would be great just for teachers who stay there to have to go back and say 'look at where we are.'"

In terms of percentages of attendance at parent/teacher conferences, Lowell again had been fairly consistent. Parent attendance averaged about 89% attendance during the 11 years with a range of 88 to 90 percent.

Summary of Analysis

Lowell School has implemented many different changes over the last 11 years.

Overall, those interviewed responded quite similarly to each other regardless if the
individual was classified or certified staff at Lowell or administration. The responses
described Lowell's culture in detail through a group report. One main difference between
the staff at Lowell and administrators was that the administrators tended to respond
globally about Lowell (i.e., in terms of its position within the District).

Key changes paralleled strengths and weaknesses as noted by the participants. The changes also were quite comparable to the main features outlined in the in-service
information from a blueprint for the ideal elementary school by Pool (See Appendix B).
A strong instructional leader and staff without turnover, multiage configurations, reading
and math LABs using block scheduling within a School-Wide Title 1 program,
community partnerships and support, school-wide expectations with conflict resolution,
and the FRC were some of the key changes and strengths. Due to the transient student
population, providing instruction and standardized testing was difficult to deliver. The
school building had become a liability and with Lowell's unique problems, the need for
an "even playing field" where Lowell received fair allocation of District resources were
mentioned as key changes and weaknesses as well.

Artifact information was acquired from mean NCE scores in reading,
mathematics, and composites of Lowell and MCPS; attendance numbers; percentages of
changes in attendance numbers; transfers in and out of Lowell; free and reduced lunch
count percentages; counseling referrals; discipline types and referrals; and attendance
percentages at parent/teacher conferences. The NCE scores did not support the trend
voiced by many of the interviewees concerning growth in student learning. Lowell's
mean NCE scores were consistently below the mean NCE scores for MCPS. Even

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though Lowell's mean NCE scores had not yet risen to the District's mean levels, Lowell had made strides considering that their population turnover averaged around 154 student transfers in and out yearly. The strides were illustrated in teachers' comments about students' growth measured by running records rather than standardized testing.

Lowell's student population had fluctuated and had steadily dropped every year during the 11-year period; however, the transfers in and out of Lowell did not show any apparent connection to percentage changes in the attendance numbers. The average transiency rate remains around 50%. Lowell's free and reduced lunch count averaged 69% of their student population throughout the 11 years. Records were not available or were too incomplete to provide adequate information for analysis in regard to counseling referrals and discipline types and referral numbers. In terms of percentages of attendance at parent/teacher conferences, Lowell showed consistency. The Lowell staff averaged about 89% attendance during the 11 years.
CHAPTER 5

DISCUSSION & RECOMMENDATIONS

The current research attempted to answer the following questions:

- What changes (intentional or unintentional) in policies/programs/procedures have occurred at Lowell over the past 11 years?
- Of these changes, which have had the greatest impact at Lowell in the past 11 years?
- How have the changes/impacts been illustrated in Lowell’s students and/or faculty?
- Have the changes/impacts made a difference in attendance, the number of counseling referrals, the number and kind of discipline referrals, and overall percentile scores of the CTBS tests in reading, mathematics, and composites comparing Lowell to MCPS norms?

Changes

Schools need to identify the types of information needed for further change; how to effectively and efficiently collect, present and use the information to improve teaching practices; and organize the information for their own decision-making. Lowell Elementary School in Missoula, MT recognized this need and implemented many changes (as one administrator stated, “There’s a huge list”) within the past 11 years in order to meet the needs of its student population. Some of the changes were initially good for Lowell’s students and have evolved to being looked at for all students. At the beginning of the changes, some educators in the District (MCPS) viewed the Lowell
project with skepticism and equated the Lowell model as one to follow in implementing multiage classrooms. However, as an administrator noted,

"Just cause you have a multiage classroom doesn't mean you're going to teach in a multiage approach...there was kind of a negative community attitude towards Lowell and maybe thinking that there were lesser expectations for student learning, as opposed to a real developmental approach that was a school-wide developmental approach and a lack of understanding it."

The main changes mentioned by interviewed participants included: turnover in leadership; Lowell as a School-Wide Title 1 school; implementing language arts blocks utilizing block scheduling and book nook (containing reading leveled books), School-Wide Assistance Teams/Behavioral Assistance Teams, and Family Resource Center; multiage restructuring and configurations; delivery of instruction; revolving door transciency; and the role of St. Patrick's Hospital. Many of these changes were consistent with the findings of research involving school reform/restructuring, strong leadership, safer schools and violence reduction, multiage approaches, self-esteem building, parental involvement, reading strategies to increase progress and eliminate retention of students, and assessment practices.

Impacts

These changes created impacts that have affected the Lowell staff, Lowell students, MCPS, and the North side population of Missoula in a variety of ways (i.e., lack of continuity with program vision maintenance, federal dollars assisted all students in learning reading and mathematics, provided a 90 and 60 minute block of uninterrupted
time in which to teach reading and mathematics through leveled LABs which utilized books from the book nook, provided the necessary structure to meet individual students needs whether stable or transient, provided families with services and materials, and provided financial support for summer programming and nursing services). Many of the participants expressed the impacts as, "...the things that made the biggest impact were professional cohesiveness, professional enhancements of staff members, and the physical changes in the daily structure.... From those changes, we got more parent involvement which then just helped impact student learning."

As one administrator stated,

"...I saw a real sense of commitment from the staff members that were at Lowell School, and I saw a maturity in data driven instructions, and a real focus on student learning. The focus was not on teaching, the focus was on learning, and the multiage approaches to student learning, the diversity of learning styles, the grouping of children, and the ability that these are our kids, not just my kids. The learning center approach that had a real literacy base really met the needs of the community and the needs of those children."

Another administrator declared, "The folks that have stayed with that [willing to re-invent the wheel] from the beginning, really epitomized what an educational professional is and should be because they have certainly been in it for the kids, and not for anything else or they wouldn't be there."
Illustrations

Illustrations of the impacts at Lowell could not be substantiated through much of the collected quantitative information. Lowell appears to be destined to have a transient population (the school averages 154 transfers in and out yearly), with the majority of its students receiving free and reduced lunches (average of 69% of the population) as well as having 89-90% attendance at parent/teacher conferences. As long as the federal guidelines for Title 1 remain the same, Lowell will continue to be eligible for qualification as a School-Wide Title 1 School.

Illustrations were evident in the comments made by the participants. Because of Lowell’s highly transient student population, standardized testing continued to lag behind the District’s average mean NCE scores in reading, mathematics and the composites. However, the staff at Lowell knew their students were progressing by using running record scores given at the beginning and end of a school year. Lowell students continue to show progress due to the commitment of its staff to multiage approaches, use of reading and math LABs in a block scheduling that reduces the number of students in a classroom and their ability to stand together to solve problems.

Recommendations

General

Multiage approaches come in all types of configurations within and out of graded systems and whatever the configurations, constant yearly adjustments can assist students and staff in maintaining a continuous progress path. Schools that have implemented and/or are interested in multiage approaches need to utilize assessments such as running
records, reading strategy tests from Reading Recovery, etc., in order to show student growth. These assessments done periodically throughout the school year can assist schools in keeping track of data to measure progress over time. Standardized tests do not seem to display the yearly progress.

A strong instructional leader with history concerning the school and knowledge about developmentally appropriate and multiage practices is vital to the morale and growth of both the staff and students of schools especially low SES and highly transient populated schools. The strong instructional leader needs to be in the school for an extended tenure to provide and implement a long-range vision for growth. The school's staff must also be unified in their support, knowledge and philosophy based upon best teaching practices.

Schools should evaluate their needs every year so that they don't jump on too many "bandwagons of change". They need to evaluate what's working and what's not working by keeping consistent and retrievable data from year to year. They can then decide what to keep and what to abandon.

Universities and colleges should provide potential new teachers with mentor teachers familiar with multiage and developmentally appropriate practices prior to their first year of teaching in order to prepare the new teachers with valuable hands-on experiences. The universities and colleges should encourage school districts to practice mentoring with first year teachers and veteran teachers within their schools. Further research is needed in how to factor out the transient variable as well as other variables (i.e., SES, parental involvement, etc.) from influencing standardization results.
**MCPS District**

The MCPS District should consider continuing to allow Lowell staff (and other schools) the autonomy to do whatever is necessary to meet the needs of the school’s student population. The definition of fair is not what is good for everybody but what everybody needs.

MCPS needs to continue to provide Lowell with block scheduling. The block scheduling is what makes the LABs possible which in turn are needed to assist growth in reading and mathematics at Lowell.

MCPS could attempt to keep better records of student achievement utilizing individualized test scores from running records or the DRA in order to show growth and to triangulate changes in district-wide assessments.

MCPS could also provide opportunities for other teachers and administrators to view and experience Lowell first hand in order to receive an accurate perception of the entire program.

**Lowell School**

Lowell School needs to continue to provide multiage configurations for its student population in order to assist with their transient population needs.

It needs to have a strong instructional leader with history concerning the school and knowledge about developmentally appropriate and multiage practices who encourages the staff to read the latest research, attend worthwhile conferences and inservices, and who maintains a vision for the future of Lowell. This leader must have an extended tenure to follow through with the vision.
Lowell School needs to continue as a School-Wide Title I School for additional funding purposes in order for all teachers to continue to provide instruction through the reading and math LABs. The school needs to keep quantifiable data not only on reading, writing and mathematics growth, but also in the affective domain concerning self-esteem, social skills, etc. The data is important for a longitudinal examination of these changes as well as other changes. Also, since discipline issues are an on-going concern, Lowell could benefit from keeping records on the type and number of discipline referrals year to year.

Finally, Lowell needs to continue offering reading and mathematic LABs utilizing block scheduling to its students as well as many of the other changes already implemented (i.e., the Book Nook, FRC, conflict resolution with peer mediators, SWAT/BAT positive plans, partnership with St. Patrick’s Hospital, etc.) to meet the ever changing needs of the North side student population. As one of the classified staff at Lowell said,

“I’ve seen the teachers in this building with this program work so hard and put themselves on the line all the time to keep the program going, keep the program that we have at Lowell going to affect even more kids. I think that has to stay. That’s been an amazing part if this school is going to succeed and if our kids are going to feel like successes.”
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Appendix A

Changes in/at Lowell
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<th>PROS</th>
<th>CONS</th>
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<tr>
<td>Lowell has opportunity to be model for others</td>
<td>Scary</td>
</tr>
<tr>
<td>Lowell has opportunity to touch community</td>
<td>Get narrow on issues</td>
</tr>
<tr>
<td>Excitement/Rejuvenation</td>
<td>Organization—How?</td>
</tr>
<tr>
<td>Experience is here</td>
<td>Hard work &amp; Takes energy</td>
</tr>
<tr>
<td>Backing of U of M and District Admin.</td>
<td>Is staff ready to do this?</td>
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<tr>
<td>Truly getting back to basics</td>
<td>Need for more materials</td>
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<tr>
<td>Teamwork—sharing ideas &amp; successes</td>
<td>Time? Pace of change?</td>
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<td>Good image to kids</td>
<td>Rules? State Government</td>
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<td>Growing from each other</td>
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<td>More arts in education</td>
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<td>Uncomfortable—this is a long-term process</td>
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<td>Having an impact on positive self-esteem</td>
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<td>More teacher choices on curriculum</td>
<td>More behavior problems?</td>
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<td>Ability to meet the needs of all students</td>
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<td>Several teachers can impact the student</td>
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<td>Avoid burn out</td>
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<td>Narrative evaluations more relevant</td>
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<td>Encourages cooperation</td>
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<td>Better behavior</td>
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<td>Improve School image</td>
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<td>Sharing with other states, WA, CA, etc.</td>
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Appendix B

Creating a Blueprint for the Ideal Elementary School
Most of us - professional educators and lay persons alike - shared a vision that a better public elementary school was possible than anything any of us had experienced, seen, heard of, or read about, whether public or private. We held the conviction that certain substantial, dramatic reforms were viable, essential, and urgent. However unrealistic this may seem to some, we genuinely thought it would be possible to incorporate all of what we judged to be the best of the philosophies and notions and principles and practices our research turned up, as well as any of our own what-we-perceived-to-be improvements and original innovations.

We believed that we could create a consensus idea-model of this "ideal elementary school" and implement it as a magnet school in our community (Missoula, Montana). Through a University of Montana Continuing Education seminar, we - a group of more than 40 parents, school board members, administrators, teachers, potential teachers, and university professors - developed (perhaps sometimes thrashed out) our blueprint throughout the 11 weeks of UM's 1990 Autumn Quarter. The concept of our "Venture in Teaching and Learning" became known by the appropriately descriptive acronymic phrase, "VITAL School."

We realized that some specifics of any particular VITAL School must necessarily be left to the implementers and we recognized that there should be a built-in dynamic so that any given "ideal school" would be under continuous review, scrutiny, and localization. Still, we turned our hand to all major aspects of the VITAL School's design and population - its philosophical/psychological base, its facility and campus, its structure and organization at the both the micro and macro levels, its leadership and personnel, its curriculum and instruction, its student body, and its parental and community involvement. We also concerned ourselves with its execution - sources of funding, appropriate political steps, potential obstacles to its development and how they might best be overcome or at least coped with.

We suspected at the outset that all our best efforts might not produce a complete and polished consensus document within one University quarter. Upon reflection, we probably came a lot closer than anyone had a right to expect. In front of a number of invited guests, each of several task forces presented its component piece of our preliminary blueprint (of more than 150 pages) during the last class session. A short version, subtitled "A Beginning Synthesis," was also shared. It was left to a small, follow-up group (during Winter Quarter 1991) to write the final synthesis and pursue publication, establish formal groups of interested parents and professionals, seek out grant dollars from outside sources, and accomplish other critical tasks.

- A SUMMARY OF THE BLUEPRINT'S KEY FEATURES -

Our ideal elementary school will have a humane, loving environment. This atmosphere will be fostered by the best efforts of all adults who serve in the school - teachers, principal, parent/community volunteers, aides and other paraprofessionals, and classified staff members. Students, too, will be helped to mediate their own problems and work toward self-discipline and thus to contribute to this positive school and classroom climate. Traditional leadership models, organizational approaches, curriculum, and instructional methodology may satisfy some, but many parents, children, and educators today seek an alternative. Hence the need for what we propose and are confident can be brought to fruition: a Venture in Teaching and Learning - a VITAL School - where smiles, excitement, and enthusiasm are the rule, not the exception. Our school will provide an opportunity for individual reflection and creativity, yet often serve as a beehive of hands-on, cooperative, and group activity.

Our school's principal will be a strong, collegial leader whose primary devotion, in both time and energy, is to a substantive, interdisciplinary curriculum, designed with students' input to meet their individual needs, and the child-centered instructional approach by which it is "delivered." Teachers will be divided into two teams for both planning and instructional purposes - kindergarten through level three
is a transition year in our model; some children will remain on the primary team for their level-three year, while others will advance to the intermediate team that year.) There will be considerable flexibility, sharing, movement, and interaction between the teams. We would like for each team to have half a day each week to devote to such pursuits as uninterrupted planning and inservice (this can be accomplished either with clever scheduling or by adopting a 4½-day student week, ideally with daycare provided at the school for those who need it during the half day the children are not required to be in school). We envision our school to have between 300 and 400 students and a faculty comparable in number to other well-staffed schools of that size. We will, however, deploy our staff members in an unconventional way, with specialists serving as regular members of each team and being resources to other teachers in their areas of specialization. Each team will have a self-selected team leader and several experienced, proven (master/mentor) teachers, as well as, when possible, one or two junior members who will help supply "new blood" to our VITAL School. All with above-normal duties and responsibilities will receive appropriate stipends over the single salary schedule. All members of the faculty will teach in all areas of the curriculum and serve all students, including those perceived to have special needs. We will have a truly continuous-progress curriculum for all students, with, then, both a special education and an enrichment program for all.

Each team will have two paid instructional assistants and, of course, the constant or at least frequent services of parent and other citizen volunteers. Parents will play a central and welcomed role in the philosophy, governance, instruction, and support - i.e., overall success - of our ideal elementary school. We will seek the active participation of all parents and guardians in their children’s education, at home and, when feasible, at school. We will develop a Key-Communicator Network and a Community Advisory Council (a group which will have representation from all elements of the school’s internal and external communities; most members will be elected); the CAC may eventually evolve into more of a Governing Council, a kind of partnership which might eventually approximate a school-level board of education. We would like to establish the concepts of lifelong learning and community education in the broadest sense our community deems useful. Our school will be a sort of laboratory setting for extensive, meaningful university involvement (faculty consultation, professorial and graduate-student research, administrative interning, teacher aiding, student teaching, etc.). (Wherever an ideal school has reasonable access to a college or university with a teacher-education and/or educational-leadership program, we believe this kind of alliance will be mutually beneficial.)

Our school will have an integrated, real-world curriculum which stresses the early and continued application of skills rather than their isolated acquisition and extended drill. Students will have choice among reasonably parallel areas for inquiry and exploration, according to their current interests and needs. With adult guidance and help, they will set many - though not all - of their study goals and evaluate their progress toward these goals. We will conduct the flexibly scheduled day through a variety of nontraditional curricular structures, including open-ended learning centers, operating in an environment of independent - but guided and supported - research conducted within a resource-rich room or area. We will have a broad range of materials, many - but not all - of them student, teacher, and parent created. Generally speaking, we will not need grade-level sets of textbooks and will not rely on the widespread use of basal series, commercially published workbooks, and drill-oriented ditto materials. Though we can certainly “make do” in a more conventional setting, we would like to have a building which has some open spaces, carpeting, amphitheaters, and nooks and crannies for learners and learning; if starting from scratch, it is interesting to note, such a facility is usually actually less expensive to build than one of traditional, multiple-classroom design.

Our student grouping will be largely, if not exclusively, heterogeneous, emphasizing cooperation and collaboration, not inter-student competition. We will not employ letter-grading; rather, portfolios and mostly narrative student progress reports, shared in parent/teacher/child conferences, will communicate children’s individual growth and development. Effective student and teacher record keeping is essential to our school’s success, for we want to be sure the needs of every student are fully met. We want every child to look forward to coming to school each day and to have schoolwork that is highly challenging, but never unreasonable; each deserves to have and maintain high self-esteem. If at some point there appears to be an obstacle to a student’s working at a level near his academic potential, we will not rest until we uncover the problem and tackle it successfully. Children and adults functioning in our VITAL School will, we predict, help to make this world a healthier, happier, and more humane place in which to live.
Appendix C

Lowell Onward to Excellence Team Letter
May 16, 1990

Mr. Jake Block, Superintendent
Missoula School District #1
215 S. 6th W.
Missoula, Montana 59801

Dear Jake:

Lowell School is a unique educational setting. We have a large transient, low income and non-traditional family population. Our standardized test scores average above the 50th percentile, however they are consistently lower than other District #1 elementary schools. Of special concern to the staff and Lowell parents is the impact that this combination of factors has on the well being and educational atmosphere available to our students and staff.

In order to address the above, a committee composed of school personnel and parents was formed. Three months ago this committee was introduced to the Onward to Excellence process through Doctors Vance and Scott and the Northwest Regional Labs. Since then, we have compiled a wide variety of data in order to develop a complete building profile.

Our research points out that: 50% of our students come from non-traditional family settings; 56% of the Lowell students qualify for free or reduced lunches; the number of transient students, to date, numbers 210 this year or 55% of the schools total population; 27% of our students qualify for Chapter 1 and/or resource; our combined individual and group counseling referrals total approximately 59% of the school’s population and discipline referrals to the office after three quarters totaled 26% of Lowell’s students with 185 separate acts of violence.

The picture this paints is one of a school with an inordinately high number of students at risk. It is with this in mind that we make the following requests for the 1990-1991 school year: An Alternative Learning Class with a teacher and an aide; Lower teacher-student ratios; A time out facility with an aide to monitor it; A breakfast program; A full time counselor; A full time physical education instructor; and Modulars to accommodate growth.

We will continue working together to identify and find other solutions for the problem areas at Lowell through the Onward to Excellence process, but we feel that the above requests are necessary to improve the learning climate at our school.

Our concern is not only for the high percentage of at risk students, but also the rest of our students who are being short changed educationally, socially and emotionally.

Thank you for your prompt consideration in this matter and we look forward to hearing from you soon.

Sincerely,

THE LOWELL ONWARD TO EXCELLENCE TEAM

cc: Mike Vance and Board Members
Appendix D

Lowell’s School Goals for 1990-1991
LOWELL'S SCHOOL GOALS FOR 1990-91

TO INCREASE PARENTAL INVOLVEMENT
- develop positive experiences and attitudes toward Lowell School.
- create a Community Advisory Council of parents, teachers, students and others.
- inventory parental skills and interests.
- hold parental meetings to explain and discuss changes.
- set up parental meetings for training and inserviceing volunteers.
- create a Parent Handbook with parents.

TO UTILIZE A VARIETY OF INSTRUCTIONAL APPROACHES
- establish teacher teams (K-2 & 3-5).
- recognize and teach to different learning styles.
- utilize cooperative learning strategies.
- integrate subject areas.
- provide for increased problem solving.
- introduce thinking.
- help students work at their own levels and rates.
- create interest centers.

TO USE ALTERNATIVE BEHAVIOR STRATEGIES
- initiate democratic approaches to discipline.
- establish peer mediation.
- introduce conflict resolution.
- have daily class meetings.
- set up a Time Out Room for students with severe behavior problems and for the evaluation, orientation and placement of new students.

TO EMPLOY TEAMING
- work toward the establishment of nongraded learning groups.
- elect team leaders.
- work on curriculum preparation & coordination.
- process strategies to implement the team & nongraded approaches.
- plan for use of University teaching assistants, student teachers and volunteers.
- work cooperatively with University advisors, District #1 advisors and parents.
- create a common team planning period.
Appendix E

The Learning Group Team Letter
August 14, 1990

Dear Parents,

On August 8, 1990, we had an informational meeting regarding proposed changes for Lowell School.

The following changes were presented:

**PRIMARY**

1. Learning Groups

   The learning groups will be composed of TK1, 1st and 2nd grade students in one classroom. Lowell has a high incidence of transient students. The influx of students causes disruption to the class and the new students. By offering a non-grade learning group we can provide each child the opportunity to work to his/her potential without interruption.

   Lowell has many difficulties with our playground and discipline procedure. By Combining children of different ages and abilities, each child develops skills in sharing, communicating, and respecting the individuality of each other.

   The learning group is a team effort emphasizing ownership of Lowell School. The learning group focuses on the interests of students, parents and teachers, and enhances the spirit of the community.

2. Curriculum

   The learning group curriculum will emphasize many learning styles which we feel will meet the individual needs of our students. Instead of separating the curriculum into subject areas such as reading, science, social studies, and art, we will be com-
binning the ideas into a complete unit centered around a theme (ex. technology, dinosaurs, plants, communication).

3. Assessment

Instead of the traditional report card we will be implementing a narrative report paired with three parent conferences. We feel the written report will have the following advantages:

1) Each child will have District 1 goals and skills to attain.

2) This report will explain in detail exactly what your child is doing in school.

3) Each child will be working on his/her own goals rather than competing with other students.

4. Interest Groups and Service

For a small portion of each day, the child will have the opportunity to participate in additional interest areas (arts and crafts, cooking, children’s choir, creative movement, woodworking, etc.)

The children will be taking the responsibility for keeping the school area tidy and occasionally going into the neighborhood to provide service, i.e. raking leaves, shoveling walks, etc.

INTERMEDIATE

The teachers in the intermediate grades will be working as a team to implement alternative strategies and a choice program. Grades 3 and 4 will begin traditionally and progress toward a choice program. At the beginning of the school year the fifth grade will be involved in a learning group program. We are also working on the possibility of implementing an alternative 3,4,5 program at the beginning of the second semester. This program would follow the ideas being implemented in the primary grades.
The learning group program in the fifth grade will be similar to that being used in the primary. The students will be working with an integrated curriculum. All subject areas will be taught. However, this approach will tie them together around one common theme.

During the day, the fifth grade students will also have opportunities to choose center activities. The activities have been designed to address the various learning styles. These activities are also an integral part of the theme.

We are working to provide new educational opportunities for your children.

Sincerely,

The Learning Group Team
Appendix F

Family Resource Center Assessment Totals
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Appendix G

MCPS & Lowell Permission Letters
April 9, 2002

Larry Johnson, Interim Superintendent
MISSOULA COUNTY PUBLIC SCHOOLS
215 SOUTH 6TH WEST
MISSOULA, MT 59801

Dear Mr. Johnson:

In order to complete my Doctorate of Education degree, I am requesting permission from the District's Administration to conduct a historical case study of Lowell Elementary School.

The purpose of the study is to explore the organizational changes in procedures, programming and policies at Lowell Elementary School over the last 11 years. Important aspects of the study will be the various participants' perceptions of Lowell, the impacts associated with the changes implemented and if the impacts have had changes associated with self-esteem, attendance, social/emotional/academic performance, etc., of Lowell students. I will investigate answers to the following questions:

What changes (intentional or unintentional) in policies/programming/procedures have occurred at Lowell over the past 11 years?

Of these changes, which have had the greatest impact at Lowell?

How are the changes/impacts illustrated in Lowell's students and/or faculty?

Have the changes/impacts made a difference in attendance, the number of counseling referrals, the number and kind of discipline referrals, and CTBS growth?

In order to accomplish the above study, I will use a qualitative case study design. The design will incorporate a simultaneous triangulation approach. The primary sources identified and used as a basis for the triangulation include: attendance records, number and kind of discipline incidents and referrals, the number of counseling referrals, minutes/recordings of PTA meetings and changes from year to year over the past 11 years in Lowell's mean percentile scores on the CTBS versus the National norms and verses MCPS' norms. I will ask participants structured interview questions through a taped, face-to-face method. Participants' identities will be randomly matched with numbers and the interviews completed without any

Mark P. Johnson, M. S.
806 Locust Street
Missoula, MT 59802
information that could identify the participants. All information is held in the strictest of confidentiality. The research may assist MCPS in gathering information on alternative programs as well as add to the body of knowledge concerning nongradedness, school reform/restructuring, school-wide programs, etc. The University of Montana Review Board for the protection of human subjects has approved this study.

If you have any questions or concerns about this study, I will be glad to discuss the matter(s) further with you at any time. I look forward to hearing from you. Please respond to me in written form of the District’s decision concerning this study. Thank you for your cooperation and assistance in this matter.

Sincerely,

Mark P. Johnson, M. S.

School Psychologist
April 9, 2002

Jerry McVay, Principal
Lowell Elementary School
1200 Sherwood
Missoula, MT 59802

Dear Mr. McVay:

In order to complete my Doctorate of Education degree, I am requesting permission from the District’s Administration and Lowell to conduct a historical case study of Lowell Elementary School.

The purpose of the study is to explore the organizational changes in procedures, programming and policies at Lowell Elementary School over the last 11 years. Important aspects of the study will be the various participants’ perceptions of Lowell, the impacts associated with the changes implemented and if the impacts changed self-esteem, attendance, academic and social/emotional/behavioral performance, etc., of Lowell students. I will investigate answers to the following questions:

What changes (intentional or unintentional) in policies, programming, and procedures have occurred at Lowell over the past 11 years?

Of these changes, which have had the greatest impact at Lowell?

How are the changes/impacts illustrated in Lowell’s students and/or faculty?

Have the changes/impacts made a difference in attendance, the number of counseling referrals, the number and kind of discipline referrals, and SRA/CTBS/ITBS growth?

In order to accomplish the above study, I will use a qualitative case study design. The design will incorporate a simultaneous triangulation approach. The primary sources identified and used as a basis for the triangulation
include: attendance and transfers in and out of Lowell, number and kind of
discipline incidents and referrals, the number of counseling referrals, and
changes from year to year over the past 11 years in Lowell's mean NCE
scores on the SRA/CTBS/ITBS verses MCPS' norms. I will ask participants
structured interview questions through a taped, face-to-face method.
Participants' identities are randomly matched with numbers and the
interviews completed without any information that could identify the
participants. All information is held in the strictest of confidentiality. The
research may assist MCPS in gathering information on alternative programs
as well as add to the body of knowledge concerning nongradeness, school
reform/restructuring, school-wide programs, etc. The University of Montana
Review Board for the protection of human subjects has approved the study.

If you have any questions or concerns about this study, I will be glad to
discuss the matter(s) further with you at any time. I look forward to hearing
from you. Thank you for your cooperation and assistance in this matter.

Sincerely,

Mark E. Johnson, M. S.
School Psychologist
Appendix H

Institutional Review Board Checklist & Approval Form

Subject Information & Consent Form
INSTITUTIONAL REVIEW BOARD (IRB) CHECKLIST

Submit one completed copy of this Checklist, including any required attachments, for each course involving human subjects. The IRB meets monthly to evaluate proposals, and approval is granted for one academic year. See IRB Guidelines and Procedures for details.

Project Director: MARK P. JOHNSON
Dept.: Education
Phone: 728-2000
Signature: ______________ Date: 5/15/02

Co-Director(s): STEPHANIE WHITE, Ph.D.
Dept.: Education
Phone: 243-2763

Project Title: Historical case study of Lowell Elementary School

Project Description: To explore the organizational changes of Lowell Elementary (an elementary school with 332 students) during and after a period of intense change. The changes, which included a new principal, new teachers, and a restructured program, had a significant impact on students and the overall social/emotional/academic performance of Lowell's students.

All investigators on this project must complete the IRB self-study course on protection of human research subjects. Certification:
(We have completed the course - Use additional page if necessary)

Students Only:
Faculty Supervisor: STEPHANIE WHITE, Ph.D.
Dept.: Education
Phone: 243-2763
Signature: ______________ Date: 4/1/02

(My signature confirms that I have read the IRB Checklist and attachments and agree that it accurately represents the planned research and that I will supervise this research project.)

IRB Determination:

___ Approved Exemption from Review

X Approved by Administrative Review (see memo on back)

___ Full IRB Determination:

___ Approved

___ Conditional Approval (see attached memo)

___ Resubmit Proposal (see attached memo)

___ Disapproved (see attached memo)

Signature IRB Chair: JANE FULLER Date: 4/10/02 (over)

For IRB Use Only

The University of Montana
INSTITUTIONAL REVIEW BOARD (IRB)

APR 04 2002

728-2000

RECEIVED
UNIVERSITY OF MONTANA
VICE PRESIDENT FOR RESEARCH

APR 04 2002

728-2000

RECEIVED
UNIVERSITY OF MONTANA
VICE PRESIDENT FOR RESEARCH

APR 04 2002

728-2000
To: Investigators with research involving human subjects

From: J. A. Rodbach, IRB Chair

RE: IRB approval of your proposal

This study has been approved on the date that the “Checklist” was signed. If the study requires an Informed Consent Form, please use the “signed and dated” ICF as a “master” for preparing copies for your study. Approval is granted and continues for one year; if the study runs more than one year, a continuation must be requested. Also, you are required to notify the IRB if there are any significant changes or if unanticipated or adverse events occur during the study. Please notify the IRB when you complete this study.

attachment(s)
SUBJECT INFORMATION AND CONSENT FORM

TITLE: A Historical Case Study of Lowell Elementary School in Missoula, MT.

STUDY DIRECTOR: Mark P. Johnson, M. S.
School Psychologist-Missoula County Public Schools (MCPS)
806 Locust Street Missoula, MT 59802
Home Phone: (406) 543-7741 Work: (406) 728-2400 ext. 7023

ADVISOR: Stephanie Wasta, Ph.D. Professor-Department of Education: Curriculum & Instruction @ the University of Montana. Phone: (406) 243-2163

Special instructions to the potential subject: This consent form may contain words that are new to you. If you read any words that are not clear to you, please call the study director above to explain them to you.

Purpose: You are being asked to take part in a research study to explore the organizational changes in procedures, policies and programming at Lowell Elementary School in MCPS over the last 11 years. Important aspects of the study will be the various participants’ perceptions of Lowell, the impacts associated with the changes implemented and if the impacts have had changes associated with self-esteem, attendance, social/emotional/academic performance, etc., of Lowell students.

Procedure: If you agree to take part in this research study you will be asked structured interview questions about the organizational changes in procedures, policies, and programming and possible impacts to Lowell through a taped recorded, face-to-face method. Permission to tape the interviews will be received prior to conducting them. Participants’ identities will be randomly matched with numbers to achieve confidentiality. Follow-up sessions will also be completed with the individuals once preliminary information has been transcribed, categorized and analyzed. The follow-up sessions will be conducted either over the phone or in person and will check for accuracy and ask for clarifications if necessary.

Risks and Discomforts: There are some apparent risks involved with answering the interview questions. Should inadvertent disclosure of your identity occur and your answers are unfavorable towards MCPS or Lowell, you may experience some psychological stress and/or potential economic loss. You will be informed of any new findings that may affect your decision to remain in the study.

Procedures to Minimize Risks and Discomforts: Subjects will be apprised of the possibility of their identities being inadvertently disclosed and may refuse to participate or may withdraw from the study at any time without loss of status or benefits entitled to them. The subjects’ identities will be randomly matched with numbers known only to the study director. All interviews will be conducted outside of school time so no conflicts will occur at school. The subjects will be provided a summary of the completed study.

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Benefits of the Study: Your assistance with this research may aid MCPS in gathering information on alternative programs, provide a realistic view of Lowell in the District, provide possible ways to improve the programming at Lowell and provide further research information to the existing research on nongraded programs/conflict resolution/school reform/ and other areas of interest.

Confidentiality: The transcribed information will be stored in a locked file cabinet at the study director’s office. Only the study director will have access to the transcriptions. The transcriptions will be done so without any information that could identify you. The tapes used during the interviewing will be erased after completion of the study. If the results of this study are written in a scientific journal or presented at a meeting, your name will not be used. Your signed consent form will be stored in a cabinet separate from the data.

Compensation for Injury: Although we believe that the risk of taking part in this study is minimal, the following liability statement is required in all University of Montana consent forms:

In the event that you are injured as a result of this research you should individually see appropriate medical treatment. If the injury is caused by the negligence of the University or any of its employees, you may be entitled to reimbursement or compensation pursuant to the Comprehensive State Insurance Plan established by the Department of Administration under the authority of M.C.A., Title 2, Chapter 9. In the event of a claim for such injury, further information may be obtained from the University’s Claims representative or University Legal Counsel.

Voluntary Participation/Withdrawal: Your decision to take part in this research study is entirely voluntary and you may refuse or withdraw from the study at any time without penalty or loss of benefits to which you are normally entitled.

Questions: If you have any questions about the research now or during the study contact: Mark P. Johnson, M. S. School Psychologist

(406) 543-7741 Home or (406) 728-2400 ext. 7023 work.

Subject’s Statement of Consent: I have read the above description of this research study. I have been informed of the risks and benefits involved, and all my questions have been answered to my satisfaction. Furthermore, I have been assured that the study director will also answer any future questions that I may have. I voluntarily agree to take part in the study and give my consent. I also voluntarily agree to give my consent for the study director to call upon me if a question needs clarification. I understand I will receive a copy of this consent form.

Printed Name of Subject ______________________ Date ______________________

Subject’s Signature ______________________ Date Approved by UMA IRB 4/10/02

Approval Expires 4/10/02

[Signature]

Chair
Appendix I

Structured Interview Questions

1. Have you seen changes at Lowell School since the 1989-90 school year?
2. Of these changes which have made an impact?
3. What kind of impacts have the changes had at Lowell?
4. How have these impacts been illustrated? What examples are available?
5. What has happened to the student population at Lowell as a result of the changes?
6. Have you seen changes in students' self-esteem over the last 11 years? If so, what kind of changes?
7. Have the impacts been equally effective for all your students, or have you found some to be more/less effective? Explain your answer.
8. Do you think most of the staff at Lowell shares your feelings concerning the changes and impacts since 1989-91? If not, why not?
9. Have your attitudes concerning the changes/impacts changed over the course of the 11 years? How have your attitudes changed?
10. In your opinion, what are the strengths/weaknesses of Lowell School?
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<td>60</td>
<td>46</td>
<td>62</td>
</tr>
<tr>
<td>94-95</td>
<td>46</td>
<td>60</td>
<td>47</td>
<td>59</td>
<td>45</td>
<td>60</td>
</tr>
<tr>
<td>95-96</td>
<td>50</td>
<td>58</td>
<td>50</td>
<td>57</td>
<td>48</td>
<td>58</td>
</tr>
<tr>
<td>96-97</td>
<td>49</td>
<td>57</td>
<td>45</td>
<td>57</td>
<td>45</td>
<td>58</td>
</tr>
<tr>
<td>97-98</td>
<td>48</td>
<td>56</td>
<td>41</td>
<td>57</td>
<td>43</td>
<td>57</td>
</tr>
<tr>
<td>98-99</td>
<td>55</td>
<td>57</td>
<td>54</td>
<td>65</td>
<td>54</td>
<td>61</td>
</tr>
<tr>
<td><strong>99-00</strong></td>
<td>69</td>
<td>71</td>
<td>NA</td>
<td>75</td>
<td>59</td>
<td>73</td>
</tr>
<tr>
<td>+00-01</td>
<td>52</td>
<td>64</td>
<td>49</td>
<td>61</td>
<td>53</td>
<td>63</td>
</tr>
<tr>
<td>+01-02</td>
<td>56</td>
<td>64</td>
<td>53</td>
<td>60</td>
<td>54</td>
<td>62</td>
</tr>
</tbody>
</table>

* = District used SRA test.
** = District separated out special education scores.
+ = District went to Iowa Tests of Basic Skills.
NA = Not Available
## Appendix K

**Table 2**

<table>
<thead>
<tr>
<th>YEAR</th>
<th>Beginning &amp; Ending Attendance Numbers</th>
<th>Percentage of Change in Attendance Nos.</th>
<th>Transfer Numbers In and Out of Lowell</th>
<th>Transiency Rate (percentage range)</th>
</tr>
</thead>
<tbody>
<tr>
<td>90-91</td>
<td>420/388</td>
<td>-7.6%</td>
<td>210</td>
<td>50-54%</td>
</tr>
<tr>
<td>91-92</td>
<td>377/408</td>
<td>+7.6%</td>
<td>125</td>
<td>33-30%</td>
</tr>
<tr>
<td>92-93</td>
<td>385/370</td>
<td>-3.9%</td>
<td>109</td>
<td>28-29%</td>
</tr>
<tr>
<td>93-94</td>
<td>401/378</td>
<td>-5.7%</td>
<td>110</td>
<td>27-29%</td>
</tr>
<tr>
<td>94-95</td>
<td>366/407</td>
<td>+10%</td>
<td>111</td>
<td>30-27%</td>
</tr>
<tr>
<td>95-96</td>
<td>378/376</td>
<td>-0.53%</td>
<td>222</td>
<td>58-59%</td>
</tr>
<tr>
<td>96-97</td>
<td>328/317</td>
<td>-2.9%</td>
<td>228</td>
<td>69-71%</td>
</tr>
<tr>
<td>97-98</td>
<td>306/264</td>
<td>-13.7%</td>
<td>152</td>
<td>49-57%</td>
</tr>
<tr>
<td>98-99</td>
<td>282/264</td>
<td>-6.4%</td>
<td>102</td>
<td>36-38%</td>
</tr>
<tr>
<td>99-00</td>
<td>252/254</td>
<td>+0.79%</td>
<td>156</td>
<td>61-61.5%</td>
</tr>
<tr>
<td>00-01</td>
<td>268/258</td>
<td>-3.7%</td>
<td>181</td>
<td>67-70%</td>
</tr>
<tr>
<td>01-02</td>
<td>260/245</td>
<td>-5.8%</td>
<td>141</td>
<td>54-57%</td>
</tr>
</tbody>
</table>
Appendix L

Table 3 shows percentages of free and reduced lunch count at Lowell over the last 11 years.

<table>
<thead>
<tr>
<th>YEAR</th>
<th>FREE &amp; REDUCED LUNCH COUNT %</th>
</tr>
</thead>
<tbody>
<tr>
<td>90-91</td>
<td>69%</td>
</tr>
<tr>
<td>91-92</td>
<td>69%</td>
</tr>
<tr>
<td>92-93</td>
<td>67%</td>
</tr>
<tr>
<td>93-94</td>
<td>67%</td>
</tr>
<tr>
<td>94-95</td>
<td>68%</td>
</tr>
<tr>
<td>95-96</td>
<td>74%</td>
</tr>
<tr>
<td>96-97</td>
<td>74%</td>
</tr>
<tr>
<td>97-98</td>
<td>69%</td>
</tr>
<tr>
<td>98-99</td>
<td>67%</td>
</tr>
<tr>
<td>99-00</td>
<td>70%</td>
</tr>
<tr>
<td>00-01</td>
<td>71%</td>
</tr>
<tr>
<td>01-02</td>
<td>69%</td>
</tr>
</tbody>
</table>
Appendix M

Table 4 shows number of counseling referrals available, number and types of discipline referrals available, and percentages of parent teacher conference attendance.

<table>
<thead>
<tr>
<th>YEAR</th>
<th>Number of Counseling Referrals</th>
<th>Number of Discipline Referrals</th>
<th>Types of Discipline Problems</th>
<th>*Parent/Teacher Conference % of Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>90-91</td>
<td>215</td>
<td>95</td>
<td>185 Acts of Violence</td>
<td>89%</td>
</tr>
<tr>
<td>91-92</td>
<td></td>
<td></td>
<td></td>
<td>89%</td>
</tr>
<tr>
<td>92-93</td>
<td></td>
<td></td>
<td></td>
<td>90%</td>
</tr>
<tr>
<td>93-94</td>
<td></td>
<td></td>
<td></td>
<td>90%</td>
</tr>
<tr>
<td>94-95</td>
<td></td>
<td></td>
<td></td>
<td>90%</td>
</tr>
<tr>
<td>95-96</td>
<td></td>
<td></td>
<td></td>
<td>88%</td>
</tr>
<tr>
<td>96-97</td>
<td></td>
<td></td>
<td></td>
<td>88%</td>
</tr>
<tr>
<td>97-98</td>
<td>132</td>
<td></td>
<td></td>
<td>89%</td>
</tr>
<tr>
<td>98-99</td>
<td></td>
<td></td>
<td></td>
<td>90%</td>
</tr>
<tr>
<td>99-00</td>
<td></td>
<td></td>
<td>Contact w/ others, inattention, name calling, taunting others.</td>
<td>89%</td>
</tr>
<tr>
<td>00-01</td>
<td></td>
<td></td>
<td>Aggression towards others, profanity</td>
<td>89%</td>
</tr>
<tr>
<td>01-02</td>
<td></td>
<td></td>
<td>Impulse control, lack of respect, aggression towards others, temper tantrums, bullying, attendance issues</td>
<td>89%</td>
</tr>
</tbody>
</table>

*=As calculated at the November Parent/Teacher Conferences.