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ABSTRACT

in 1990, the Ontario (Canada) Ministry of Education implemented the Transition Years project, an initiative for restructuring middle-grades education. This document presents findings of a study that identified effective policies and practices used by the pilot schools. Data were derived from: (1) surveys completed by staffs in approximately 325 of the 396 pilot sites in English and French-language schools; (2) a survey of 3,557 students in the 325 schools; and (3) case studies of six participating schools. The educational change is analyzed according to the following dimensions--substance, context, purpose, process, and realities. Findings indicate that teachers were confused about the project's purpose and that sites had varying purposes of scope. Finally, a partnership is needed among teachers, students, and parents for successful implementation. Four figures are included. (LMI)

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Years of Transition: Times for Change

**A Review and Analysis of Pilot Projects
Investigating Issues in the Transition Years**

Volume One Context and Summary

Principal Investigators

Andy Hargreaves
Kenneth Leithwood
Diane Gérin-Lajoie
Brad Cousins
Dennis Thiessen

Contributing Authors

Lorna Earl
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of Education
and Training
Ontario

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**A RESEARCH STUDY COMMISSIONED BY THE
ONTARIO MINISTRY OF EDUCATION AND TRAINING**

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1.0

Introduction

This is the final research report of issues arising from pilot projects funded by the Ontario Ministry of Education and Training to undertake initiatives in the Transition Years — i.e., Grades 7, 8 and 9. The report is presented in four volumes. The present volume, *Volume 1: Summary*, begins with the historical and policy background to the restructuring of the Transition Years in Ontario, and locates the establishment of the Ministry funded pilot projects and the present research study of those projects within this broader framework. It then summarizes the design of the study, the research methods used, and the study's major findings and conclusions, all of which can be studied in detail in the ensuing volumes of the report.

Volume 2: Explaining Variations in Progress, describes the quantitative survey component of the study. This component is based on evidence collected from students, teachers and administrators in all pilot project schools. *Volume 3: Realities of Restructuring*, describes the qualitative case study component and contains detailed portraits of how people are interpreting and experiencing restructuring in six pilot project schools (four English language, two French language) across different parts of the province. This volume also contains a separate chapter on parents' perspectives concerning the Transition Years initiatives.

Volume 4: Exemplary Practices in the Transition Years: A Review of Research and Theory, reviews existing literature and research on the Transition Years within each of the components such as core curriculum and student services that formed the basis of the provincial government initiative.

2.0

The Contemporary Context

The changes now facing our students and our schools are not confined to education, but are rooted in a major and more general transition from an industrial to a postindustrial society. These changes pose challenges in the areas of:

- economic and occupational flexibility;
- technological sophistication and complexity;
- scientific uncertainty;
- cultural and religious diversity;
- organizational fluidity.

2.2 Economic and Occupational Flexibility

As we approach the turn of the century, labour markets, job opportunities and occupational structures are undergoing a remarkable metamorphosis. With the advent of fibre-optics, computerization and miniaturization, postindustrial economies are producing small things more than big things, services more than goods, knowledge and information more than products. This trend is creating the need for a workforce that is no longer mainly located in the blue-collar world of traditional manufacturing but in the white collar world of the service and information sectors. With the emergence of a more flexible economy comes the demand for new skills and approaches such as creative problem solving, responsive marketing, and effective linking strategies (Reich, 1992).

2.3 Technological Sophistication and Complexity

One fascinating feature of our postindustrial society is the way in which it is permeated by technologically generated images. Canadian teenagers aged 12 to 17 spend 2.7 hours and children spend 3.1 hours per day watching television. In 1989, 82% of 15-19 year olds knew how to use a computer. Sixty-three percent had formal training in computer use and 35% had a computer at home (Lowe, 1990). Many of today's youth live in a world where reality tries to live up to its images, becomes suffused with images, and may be indistinguishable from its images.

The spectacle and superficiality of an instantaneous visual culture may supersede and obliterate the necessary moral discourse and studied reflection characteristic of a more oral and written culture. The choices, however, are not between embracing technology uncritically, or avoiding it all together. The key challenge is how to engage effectively

with the images and technologies of the postindustrial world, without jettisoning the critical analysis, moral judgement and studied reflection they threaten to supersede.

2.4 Scientific Uncertainty

Changes in communication and technology are leading to accompanying changes in what we know and how we come to know it. Global communications and sophisticated technology are compressing space and time, leading to an increasing pace of change in the world we seek to know and in our ways of acquiring that knowledge. This, in turn, threatens the stability and endurance of our knowledge, making it fragile and provisional. In addition to all this, increasing migration and international travel are bringing different belief systems into greater contact. This transformation in our ways of knowing in many respects marks a movement from a state of cultural certainty to a state of cultural uncertainty. Previously incontrovertible fact now becomes less credible and more open to scrutiny, further inquiry and modification. As scientific knowledge becomes more and more provisional, as its findings are revised or reversed at an ever increasing rate, processes of inquiry, analysis, information-gathering and other aspects of 'learning-how-to-learn' in an engaged and critical way take on greater prominence.

2.5 Cultural Diversity

Because the percentage of children in the Canadian population is declining and the fertility rate is below replacement level, the Canadian government has raised immigration levels for the period 1990-1995. The number of immigrant children is expected to rise considerably to an expected 300,000 children in 1990-1995, compared with 160,000 children who arrived between 1984 and 1989. Of this number, 47% are expected to arrive from Asia, 27% from Europe, and 16% from the Caribbean and Central and South America (Burke, 1992). Most of these children (55%) will live in Ontario.

2.6 Organizational Fluidity

Conventional, bureaucratic organizations do not fare well in the volatile conditions of the postindustrial age. Specialized functions and the cubbyhole-like structures that arise from them, create departmental territories and identities that inhibit identification with and commitment to the organization as a whole and the goals it pursues.

Structures, roles and responsibilities created for one set of purposes during the organization's development tend to solidify and become unable to adapt to new purposes and opportunities as they arise.

In conventional hierarchies of leadership and supervision, as change accelerates, innovation multiplies, and the timeframes expected for decision-making become more compressed, individual leaders and supervisors tend to become overloaded and overwhelmed. In consequence, they may make bad decisions, hasty decisions, or no decisions at all.

Patterns of delegation and chains of command that are the rational response to size and complexity in a relatively stable environment, merely fetter the organization during conditions of rapid change. This delays decision-making and responsiveness, and reduces the risk and opportunism that are essential to success in turbulent times.

The kinds of organizations most likely to prosper in the postindustrial world, it is widely argued, are ones characterized by flexibility, adaptability, creativity, opportunism, collaboration, continuous improvement, a positive orientation towards problem-solving and commitment to maximizing their capacity to learn about their environment and themselves.

2.7 The Contemporary Context and Schooling in the Transition Years

Schooling in the Transition Years, then, occurs in a context of cultural diversity, scientific uncertainty, technological complexity, economic and occupational flexibility, and increasing organizational fluidity. These contemporary realities challenge schools: to emphasize skills and qualities like adaptability, responsibility, flexibility and capacity to work with others; to experiment with innovative applications of technology; to broaden their approaches to teaching and learning; to address the needs of much wider and more culturally, ethnically and religiously diverse populations; and to become effective learning organizations. After some efforts to increase their effectiveness and improve their operations, some schools have turned to internal *systematic reform* and *restructuring* to make significant changes in their practices.

3.0

Strategies of Change

3.1 As problems of disengagement and dropout continued, many educators initially responded with either *effective schools* programs or *school improvement* projects. Some educators, dissatisfied with these approaches, turned to more dramatic and more widely focused efforts of *systemic reform* and *school restructuring*. Here, we provide a brief description and critique of each strategy.

3.2 Effective Schools

School effectiveness research and practice rest on the fundamental principle that schools can make a difference to the achievements of their students, irrespective of social background. Promoted in the cause of creating greater educational equity (Edmonds, 1979), school effectiveness research and practice is predicated on the fundamental belief that all students can learn (Murphy, 1992). It focuses clearly on outcomes, on taking responsibility for student learning, and on consistency in trying to achieve those outcomes.

The various studies have led to an accumulated 'wisdom' about what the major components or criteria of an effective school are (Purkey and Smith, 1983; Reynolds, 1988; Lezotte, 1989). These include:

- high expectations for student achievement;
- a strong focus on instruction as indicated, for example, in high proportions of instructional time;
- a safe, orderly and supportive school climate or atmosphere;
- strong leadership by the principal;
- systematic measurement of student achievement to be used as a basis for program evaluation.

School effectiveness research has certainly helped challenge conventional and complacent assumptions that children are 'victims' of their social and family backgrounds. It has encouraged us to take responsibility for recognizing that all students can learn and to encourage them to do so. However, the resulting strategies to establish effective schools have embraced a limited set of learning outcomes, inappropriate for the challenge and complexities of the postindustrial world. And while we know what effective schools look like, we do not know how to establish them or maintain them over time. The emergence of school improvement research and practice has been a response to these limitations.

3.3 School Improvement

School improvement focuses on the process of change more than its product. It addresses whether schools can change, and if so, how. Stoll (forthcoming) and others have summarized the major findings and insights of school improvement research and practice like this:

- Successful school improvement is a process, not an event of adoption, implementation, institutionalization, and managed change (Fullan, 1991);
- Successful school improvement embraces continuous problem-solving by all the participants, not imposed change from the outside. As Fullan and Miles (1992) put it, "problems are our friends";
- Successful school improvement involves teachers extensively in the process of improvement and the planning of its early goals;
- Successful school improvement nourishes strong and supportive cultures of teaching which value professional collaboration, trust, risk-taking, and commitment to continuous improvement (Rosenholtz, 1989);
- Successful school improvement retains and always returns to a focus on instruction as the heart of improvement efforts;
- Successful school improvement recognizes that the school is the centre of change (Sirotnik, 1987).

School improvement has made available useful models and methods for bringing about positive change in schools for the benefit of the students they serve, but school improvement, too, has come up against some important limitations. Particular strategies are sometimes difficult to replicate and often run up against traditional structures and procedures that are slow and even impermeable to change. A "third wave" of strategies has emerged to address and attack these very structures.

3.4 Systemic Reform

In *The Predictable Failure of Educational Reform*, Seymour Sarason argues that by the criterion of classroom impact, most educational reform has failed (Sarason, 1990). One of the reasons for this failure is that the different components of educational reform have neither been conceived nor addressed as a whole, in their interrelationships, as a complex system. If components like curriculum change, or professional development, or new teaching strategies are tackled in isolation while others are left unchanged, the success of the reforms will almost certainly be undermined. Teacher development and enhanced professionalism must also be undertaken in conjunction with developments in curriculum, assessment, leadership, and school organization. If reform is to be extensive, it must also be systemic.

While the experience of reaching the limits of effectiveness and improvement as patterns of change has prompted many people to embrace the principles of systemic reform, these principles have often been adopted in ways that fail to incorporate some of the fundamental lessons of school improvement: particularly the need to secure commitment to and involvement in reforms of those teachers who will be responsible for implementing them. There has been a tendency within many instances of systemic reform to impose new curricula, public examinations, standardized tests, and the like on teachers with absolute disregard for the practical or political necessity of consultation or consent (Goodson, 1990; Hargreaves, 1989; Hargreaves and Reynolds, 1989). Change models geared towards building commitment among teachers responsible for reforms are much more likely to be effective than ones which rest primarily on principles of control. This does not eradicate the role of systemic reform, but it does raise questions about how such reform should be managed, and about who should participate in its development. Such questions point to a parallel need for strategies of *restructuring* to accompany ones of *systemic reform* in developing

appropriate responses to the continuing and contemporary problems of the postindustrial age.

3.5 Restructuring

In the space of just a few years, restructuring has become common currency in educational policy vocabulary, but with various, conflicting and sometimes ill-defined meanings. While the specific components of restructuring vary from one writer to another, most seem to agree that what is centrally involved is a fundamental *redefinition of rules, roles, responsibilities and relationships for students, teachers and leaders in our schools* (Schlechty, 1990). Restructuring addresses fundamental needs for more relevant and engaging student learning, more continuous and connected professional development, and more flexible and inclusive decision-making (Lieberman et al., 1991). It focuses on the patterns of communication, the relationships of similarity and difference among principals, teachers, parents and students in schools. It is concerned with creating better ways for these educational partners to do business together in order to build common cause and mutual understanding for the ultimate benefit of students. And it calls for a significant redistribution of power relationships, especially between administrators and teachers, between teachers and parents, and between teachers and students (Sarason, 1990).

The classroom and staffroom realities of restructuring are often very different from the symbolic (though not necessarily insincere) rhetoric that is inscribed in administrative visions and documents. In their evaluation of projects designed to restructure urban schools funded by the Casey Foundation in the United States, Wehlage, Smith & Lipman (1992), for instance, found that even with extensive funding, community involvement, and project monitoring; and even though the project focused clearly on elements such as site-based management, flexible organization, individualized learning, staff development and inter-school networking, "the great majority of New Futures interventions were not bringing about fundamental change... they left the basic policies and practices of school unchanged." There was "almost no fundamental change in the primary intellectual activities... in schools." This study serves to remind us about the importance of determining what lies behind the smoke and mirrors of restructuring, about identifying gaps between reality and rhetoric.

3.6 Change Strategies and Schooling in the Transition Years

In addition to the contemporary challenges summarized in Section 2, schooling in the Transition Years also operates in a context of intense demands for changes and competing strategies to make these changes happen. Effective schools and school improvement programs strive to make existing structures and practices better. Systemic reform and restructuring initiatives set out to dismantle old ways and create new relationships and cultures in schools. Understanding these changing social and educational "realities" is essential to understanding the contexts of schools involved in Transition Years pilot projects. Another important element is the historical and policy background that gave rise to this study.

4.0

Historical and Policy Background

4.1 In Ontario, as in many other jurisdictions, education is closely tied to the political agenda. Among the policies which have created controversy both historically and in the contemporary setting, are those policies surrounding the planning of an appropriate educational experience for Ontario's adolescent learners.

4.2 Enduring Issues

The history of appropriate education for Ontario's adolescents can be characterized as a series of public debates set against a recurring cycle of reform and reaction. Over the past hundred years, the topics of these debates have remained remarkably consistent, centering on such issues as:

- the purpose of secondary education;
- easing the transition of students from elementary to secondary schools;
- placement of students into streams of study;
- the links between student achievement and parental socio-economic status;

- the suitability of assessing student achievement through external examinations;
- the level (school, school board or province) at which control over curriculum should be exercised;
- the relevance of classroom materials to students' experience;
- the differences in orientation between elementary and secondary schools;
- the discrepancies between research findings and classroom practice.

4.3 Past Efforts and Current Problems: To the 1980s

In the latter part of the nineteenth century and the first half of the twentieth century, the debates about the most appropriate schooling for young adolescents focused on the growing divisions between Grade 8 and Grade 9, the relevance of curriculum to students with very different social and occupational destinies, and the extent to which schools and programs should be differentiated according to academic and vocational routes.

The debate on how and where the needs of early adolescent learners could best be served reached a peak in the 1930's. This decade witnessed much discussion and some experimentation with intermediate schools -- schools where early adolescents were programmed for as a unit. In a few schools across Ontario, Grades 7 and 8 and in at least one instance, Grade 9, were combined into one organizational or administrative division. In spite of the fact that the intermediate school was presented as a more effective means of meeting the cognitive and affective needs of the early adolescent learner, their success was limited by the political storm which they created. Especially contentious was the impact which intermediate schools would have upon jurisdictional control jealously guarded by the teacher federations and the implications which intermediate schools raised for extension of the separate school system. The concept outlined in an intermediate school bill, which was introduced twice -- in 1934 and 1936 -- never found its way into the provincial statutes.

Advocates of a more effective transition of students from elementary to secondary schools were not defeated by this setback. Under a scheme which came to be known as

the McArthur Plan, schools were encouraged to make the Grade 9 curriculum common for all students — regardless of the program for which they were bound. The implementation of the McArthur Plan was permissive — schools which could not afford the necessary specialist teachers or facilities to implement the home economics and industrial arts components of the new Grade 9 program were exempted. It has been estimated that by the end of the 1930s, 20% of the province's schools were under this plan (Stamp, 1982:161). A few schools in the province went further — extending the common curriculum into Grade 10. These changes, combined with the temporary suspension of the external departmental examinations, made the 1930s the last moment of experimentation before the return to conservatism and "back to basics" of the post war period.

In the early 1950s, in an attempt to bridge the gap between elementary and secondary schools, an intermediate division was created once again. A few school boards in the province even reorganized their systems into junior high schools. Under *Curriculum Memorandum 3: Establishment of Local Committees on Curriculum (May 1950)*, school boards were directed to create committees of teachers from Grades 7 and 8, and Grades 9 and 10 to engage in "planning of local instructional programs for the Intermediate Division" (p. 5). The failure of an appropriately supported implementation plan for these curriculum initiatives, coupled with another swing of the educational reform pendulum doomed this initiative.

The years between 1960 and 1992 have seen similar swings of the educational reform pendulum to those which characterized the pre-war period. Again, the greatest challenges could be seen in the attempts to reform secondary education. With the *Technical and Vocational Training Assistance Act (1960)*, federal funding for vocational high schools and vocational components of composite high schools was made available to finance the necessary expansion arising from immigration and the post-war baby boom. Secondly, the Reorganized Program of Study for secondary schools, which came to be known as the Robarts Plan was announced in August 1961 and formalized in the document *Circular H.S.1 (20 M-January 1962)*. In theory, high schools were to offer three programs of study to students: Arts and Sciences; Business and Commerce; Science, Technology and Trades. All three branches were to be equal in status and outcomes. In each of the programs, after a common Grade 9 year, students were to be streamed into one of three options: a five year program leading to university; a four

year program leading to entry into skilled employment at the end of Grade 12 and a two year program leading to employment in the service industries. In practice, though, students were streamed after Grade 8. The only branch in which five year programs developed was Arts and Science.

Under the leadership of Education Minister (later Premier) William Davis, the Robarts Plan was replaced with the Davis Plan. Under the *Circular H.S.1: Recommendations and Information for Secondary School Organization Leading to Certificates and Diplomas 1969-70*, programs were organized into four areas of study: Communications, Social Sciences, Pure and Applied Sciences and Arts. The credit system was introduced "to provide a wider choice of subjects and facilitate a system of subject rather than grade promotion" (p. 11). Courses were to be offered at up to four levels of difficulty.

The *Secondary School Diploma Requirements H.S.1 1974-5* signalled the reintroduction of more compulsory credits and less student choice in the secondary school program. Stamp describes this document as signalling the end of an era of reform: "it seemed time to return to the basic subjects and the more rigorous pedagogy that had characterized Ontario education for most of the previous century" (Stamp, 1982:248).

With courses offered at four levels of difficulty (modified, basic, general and advanced) and the number of compulsory credits raised to nine, central control was reasserted. The age of expansion was over. Issues of declining enrolment, reduction in the funding available for education and an oversupply of teachers led to a mood of pessimism.

4.4 Intensification in the 1980s and into the 1990s

In a response to growing criticism of secondary education, in April of 1980, Minister of Education Bette Stephenson established the Secondary Education Review Project (SERP).

Based on public hearings and on reaction to a second report, *The Renewal of Secondary Education*, the Ministry of Education released *Ontario Schools: Intermediate and Senior Divisions (OSIS)* in 1984. OSIS spanned the Intermediate and the Senior Divisions. It drew attention to the need to improve the transition between elementary schools, and attempted to encourage students to stay in school by suggesting that courses be offered at three levels of difficulty -- basic, general and advanced.

When OSIS was released, most schools concentrated on the administrative tasks set out: developing appropriate coding of courses; writing codes of behaviour; creating "second generation" guidelines and courses of study. Many school boards established study committees to explore ways of meeting the needs of a more culturally diverse student population more effectively. The majority of these committees addressed students' needs in the general level programs.

The late 1980s witnessed increased attention to the issue of dropouts. Beginning with *The Ontario Study of the Relevance of Education and the Issue of Dropouts*, several studies were published addressing problems which the Ontario school system was encountering in meeting the needs of adolescents (King et al., 1988; Lawton et al. 1988; Karp, 1988; MacKay & Myles, 1989). In 1988, the Select Committee on Education, a multi-party committee, received briefs from a large number of constituent groups. In its first report, the committee made several recommendations specific to improving the linkage between the elementary and secondary panels. Some of the Select Committee's recommendations were announced as policy in the Speech from the Throne in April of 1989. These included:

- a core curriculum for Grades 7,8,9;
- elimination of streaming in Grade 9;
- improvement in the transition of students from elementary to secondary school;
- improving the transition from early secondary school to the years of specialization.

To assist schools in planning programs for early adolescents more effectively, the Ministry of Education commissioned several research studies, including the present one. *Rights of Passage: A Review of Selected Literature About Schooling in the Transition Years* (Hargreaves & Earl, 1990) and *Making Connections: Guidance and Career Counselling in the Middle Years* (Levi & Ziegler, 1991) were issued to all high schools and middle schools. In January 1990, the Ministry of Education announced that funding would be available for schools and school boards throughout the province to mount Transition Years pilot projects and provided a framework of guidelines and criteria which these

projects would need to address in order to receive funding. As outlined in *Transition Years Pilot Projects, 1990-91: Year I Reports*, sixty-four two year Pilot Projects were initiated. One of the conditions of the funding was participation in a Ministry of Education funded study of the projects. The contract for this study was awarded to a team at the Ontario Institute for Studies in Education. The results of this research are presented in the four volumes of this report.

4.5 Schooling in the Transition Years: At the crossroads

The historical development of secondary education within Ontario offers evidence for the existence of recurring issues and debates in education. Though the exact terms of debate differ from decade to decade, these recurring themes could now be characterized as including:

- Tensions between the *selection* of students at some point for different social and occupational destinies and their *inclusion* for as long as possible within the educational community.
- Tensions between *choice* and *commonality* in the programs that adolescents and early adolescents experience. In some respects, choice opens up opportunities. In principle, it allows students' interests to be met and later specializations to be properly prepared for. But in practice, choice has often been channelled or guided by available resources, qualification requirements, or by the advice, inclinations and desires of teachers, parents and students themselves. Where (as in streaming) choices are made within a system graded into levels of difficulty, or where (as in boys' and girls' patterns of choices within the sciences) they have longer-term career implications, early choices can close options instead of opening them. The recurrent search for common programs to counter such difficulties has always been resisted by those who seek earlier and therefore better preparation for higher level courses, leading to university study and, later, the professions. The principles of choice and commonality have therefore marked out and continue to mark out a complex terrain of competition, compromise and sometimes sheer clutter in and around Grade 9, as the movement from optional programs to common ones, and the constant experimentation with different formulae for required credits and levels of difficulty, reveals.

- Repeated difficulties with achieving effective implementation of new policies. This points to the relatively recent awareness in policy as well as research, of the complexities of implementation and change processes. It also points to the deeply ingrained nature of habits, assumptions and structural frameworks which persistently obstruct, undermine or reinterpret and rework reforms designed at the level of policy, to make them into something quite different at the level of the school or classroom.

While this historical context might lead some to fear “more of the same” from the current round of Ontario educational reforms in terms of poor implementation, failed reform, and returns to models that have been rejected before, there are some clear reasons why this *need not* be the case this time.

- First, it would seem that existing paradigms of change in secondary education in particular have become exhausted. Reforms *within* the accepted structures and assumptions of secondary education have failed repeatedly to bring about significant improvements.
- Second, many of the contemporary challenges that educators of early adolescents now face are qualitatively different from those which were confronted in previous generations. We are now beginning to understand the difficulties of working within school structures established for and consolidated within the industrial age of mechanical industry and rigid social class systems. Teachers now, however, have to prepare young people for a postindustrial world characterized by accelerated change, economic and occupational flexibility, technological sophistication and complexity, cultural diversity, scientific uncertainty and increased organizational fluidity. These contemporary challenges *are* distinctive. They make distinctive demands on students and pose unique challenges to their teachers, and to the organizational structures of schooling in which better, more socially appropriate teaching and learning can take place. These are new problems, and they require new solutions.
- We understand more, much more, about the processes of change, implementation and professional growth for teachers than we once did. There are opportunities to construct new patterns of reform which are more

mindful of this enhanced understanding of the change process. Awareness carries with it no guarantees of success, of course. But the growth in understanding of the change process is real, as are the opportunities for effective reform which accompany it.

5.0

Study Objectives

5.1 Our study has set out to collect and interpret quantitative and qualitative data in order to assist the government, school boards and schools themselves in developing policies and programs for students in the Transition Years (Grades 7, 8 and 9) in Ontario. The study describes the range of pilot project settings in which Transition Years policies are being implemented, along with the various realizations and interpretations of such policies across those settings. Within this range, the study identifies and describes successful and less successful practices in Transition Years initiatives along with the contexts that create these differing consequences. The study is sensitive to and actively explores the differing circumstances that exist in English-language and French-language schools, and the bearing they have upon Transition Years initiatives.

5.2 The study is organized into two separate but related methodological strands. The first is a quantitative, survey-based examination of processes used to implement Transition Years policies in schools and classrooms across a wide sample of pilot projects and the early effects of these efforts. The second is an intensive, qualitative, multi-site case study of the effects of policy upon practice in particular settings, and also of the implications and consequences of existing school and classroom practice for the development and implementation of the new policy. Methodologically, the study is therefore organized into a quantitative survey component and a qualitative case-study component. Conceptually, it investigates the customary effects of policy upon practice and the less frequently studied effects of existing practice upon attempts to implement new policies. Building on this dynamic and innovative interaction between complementary research methods and between different conceptual starting points, the project has sought to identify factors, and construct realistic portraits which will assist the successful development, definition and implementation of Transition Years policies within Ontario schools in the Transition Years.

5.3 The specific objectives of the study are:

1. To identify and describe the range of policies and practices being developed across the pilot projects especially with regard to each of the six components of the Transition Years initiative identified by the Ministry of Education and Training (i.e., core curriculum; assessment, evaluation and reporting; school organization; student support services; community involvement; and teacher inservice education).
2. To determine the extent to which and ways in which the components of the Transition Years initiative interrelate at the level of school organization, in the teacher's approach to classroom instruction and in the experience of the students.
3. To identify and describe the 'deep' or 'second order' changes that enhance or inhibit implementation of first order changes in Transition Years components. Examples of second order changes include school system standard operating procedures, school leadership, the work culture of teaching, teacher-student relationships, and other school and community conditions more generally.
4. Through all of the above, to analyze and explain patterns of development and implementation of Transition Years policies across different school settings (i.e., to study the effects of *policy upon practice*).
5. Concurrent with (4), to investigate the effects of existing classroom practices and priorities, the work culture of teaching and other school conditions on the implementation of Transition Years policies (i.e. to study the effects of *practice upon policy*).
6. To identify and examine the distinctive needs and contributions of French language schools in the development and implementation of Transition Years initiatives which are important for French language schools themselves, and instructive for other schools and school systems as well.

6.0

Conceptual Framework

6.1 The report is based upon a conceptual framework consisting of four major components:

- control-based versus commitment-based approaches to policy development and implementation;
- an interactive relationship between educational policy and practice which involves influences of policy upon practice, and influences of practice upon policy;
- an understanding of educational change as consisting of five interrelated and indispensable dimensions: substance, context, purpose, process and realities;
- models of educational leadership useful in fostering school change, including forms we call "transformational".

6.2 Commitment-based approaches to change reject bureaucratic controls as the way to secure improvement and instead seek to create new working arrangements that increase teachers' motivation and their engagement in the task of teaching. The survey component of our study reported in Volume 2 is predicated on a model of building commitment to and engagement in problem solving among school staffs in order to implement Transition Years initiatives effectively. In Volume 2, the major factors involved in building commitment to change and problem-solving are identified as out-of-school conditions, school leadership, in-school conditions, and the interactive effect of all these on Transition Years practices and student outcomes.

6.3 School leadership is a factor of central concern in Volume 2. Substantial evidence from earlier studies of school improvement and correlates of effective schools depict such leadership as a major explanation of variation in both the success of school improvement initiatives and the effectiveness of schools. But school restructuring initiatives such as the Transition Years call into question forms of school leadership which, until this point, have seemed productive. Included as part of the research in

Volume 2 is an exploration of the nature and effects of "transformational" forms of leadership.

6.4 Undertaking a review and analysis of pilot projects raises necessary questions about the relationships between policy and practice. This study addresses the usually understood process by which policy affects practice through mediating processes of interpretation and implementation. This *policy-into-practice* approach begins with the policy at the foreground of attention, then looks at how the vicissitudes of practice lead this policy to be adopted, adapted, redefined or rejected. In Volume 3, the study also addresses the less understood ways in which culturally embedded, historically ingrained and structurally reinforced forms of existing practice develop and persist in ways that deflect or diminish the purposes of policy. This *practice-into-policy* approach places the historically, culturally and structurally determined nature of existing practice in the foreground, and looks at how new policies do or do not impact on these heavily nested systems and the powerfully ingrained assumptions contained within them.

6.5 The implementation of Transition Years initiatives, beginning with the pilot projects, involves elements of both restructuring and reform. Each of these are particular forms of educational *change*. While researchers and educational leaders often focus on the *change process* in order to manage implementation effectively, change is a more complex phenomenon than this. It has many dimensions, not just one — all of which have important implications for implementation. These are: the context of change; the substance of change; the purpose of change; the process of change; and the realities of change.

7.0

Research Design

Our methodology was two-pronged: one mainly quantitative and survey-based; the other mainly qualitative and case-study based. In this respect, our methodological approach is broadly complementary.

For many years, qualitative and quantitative methods were held to be opposed and irreconcilable. Qualitative methods were charged with being "anecdotal and impressionistic" (Croll, 1980). Quantitative methods were in turn accused of being

superficial and containing undeclared value judgements that weakened their claims to objectivity (Douglas, 1970). Yet, as Morey & Luthans (1984:28) contend, "the potential and real disagreements among organizational researchers over these contrasting approaches are unfortunate and can lead to neglect of common interests... on both sides." Similarly, Boyd & Crowson (1981:319) argue that both perspectives should be accepted since they complement and presuppose each other. Textbooks on educational research methods are increasingly emphasizing the benefits of complementary research methods (e.g. Jaeger, 1988).

Complementary research methods have benefits for triangulation or confirmation — studying the same problem from different points of view and trying to get a common 'fix' on it. But according to Greene, Caracelli & Graham (1989), complementary methods also have benefits in studies which are developmental and exploratory in nature. Jick (1983) points to the creativity and insight which complementary methods generate:

When different methods yield dissimilar results, they demand that the researcher reconcile the differences somehow. In fact, divergence can often turn out to be an opportunity for enriching the explanation.

(Jick, 1983:143)

"Empirical puzzles" can arise when results do not converge. This calls for more systematic explanation of the possible causes of such inconsistency (Greene et al., 1989). Thus, in addition to the benefits of triangulation and cumulation, complementary methods, through the problematic discrepancies they raise, are a source of theoretical creativity, insight and surprise — yielding innovative and unexpected findings.

In this respect, this study brings together two different, interacting strands of investigation. The quantitative survey strand is extensive in scope, numerically rich, and provides comparable findings on focused questions. It yields a broad view of development and implementation issues across a relatively large sample, in a way that builds cumulatively on existing and previously tested theoretical models of the policy development and implementation process. It offers a particularly sound basis for claims of generalizability (claims that the results are applicable to many settings).

The qualitative case study strand yields descriptively rich and often unanticipated data on the meanings that administrators, teachers, students and sometimes parents attach to

their experience of the initiative and of schooling in general. This generates in-depth, highly textured views of a smaller number of cases which capture the subtleties and complexities of Transition Years experiences, show how they present themselves and how they interact in different kinds of schools, and illustrate how they impact on actual teaching and learning behaviours and not just on statements people make about those behaviours. This strand offers a sound basis for claims of descriptive validity (claims that the data accurately and fully describe what people are actually doing in relation to Transition Years initiatives). Both components have different and complementary strengths. Both are essential.

8.0

The Quantitative Survey Study

8.1 Background

8.1.1 Survey data were collected from administrators, teachers and students in Ministry-funded Transition Years pilot sites, in both English and French language schools, in order to answer six broad questions:

1. To what extent are educational practices in the Transition Years pilot sites consistent with Ministry Transition Years expectations and the results of relevant research?
2. Which student outcomes are currently being achieved or are anticipated being achieved as a consequence of Transition Years pilot site initiatives?
3. How favourable to pilot site initiatives are conditions which prevail in schools included in such sites?
4. How favourable to pilot site initiatives are conditions found in or provided by the local community, the school system and the Ministry of Education and Training?
5. What forms of leadership seem most helpful in the Transition Years pilot sites?
6. What accounts for variation across Transition Years pilot sites in the nature of educational practices and the achievement of student outcomes?

8.2 Framework

8.2.1 Transition Years initiatives have ambitious purposes but the specific educational practices to accomplish those purposes require sustained problem solving on the part of school staffs. Successful efforts to implement Transition Years initiatives need to foster considerable commitment to and engagement in such problem solving. For this reason, the framework guiding the study (summarized in Figure 1) defines the meaning of commitment and engagement, identifies the basic conditions likely to give rise to such commitment and describes the source of those conditions for school staffs both inside and outside of the school.

8.2.2 Outside sources of staff motivation or commitment were:

- *Ministry*: the extent to which school staffs value the efforts of Ministry personnel to explain the Transition Years and its implications for their work; and the perceived adequacy of the curriculum resources, money, personnel and other resources provided by the Ministry.
- *School System*: the degree to which staffs perceive as helpful the leadership provided by school board personnel and professional associations, school board staff development opportunities, resources and school board policy initiatives in support of the Transition Years.
- *School Community*: the extent of support or opposition from parents and the wider community for the Transition Years, as perceived by staffs.

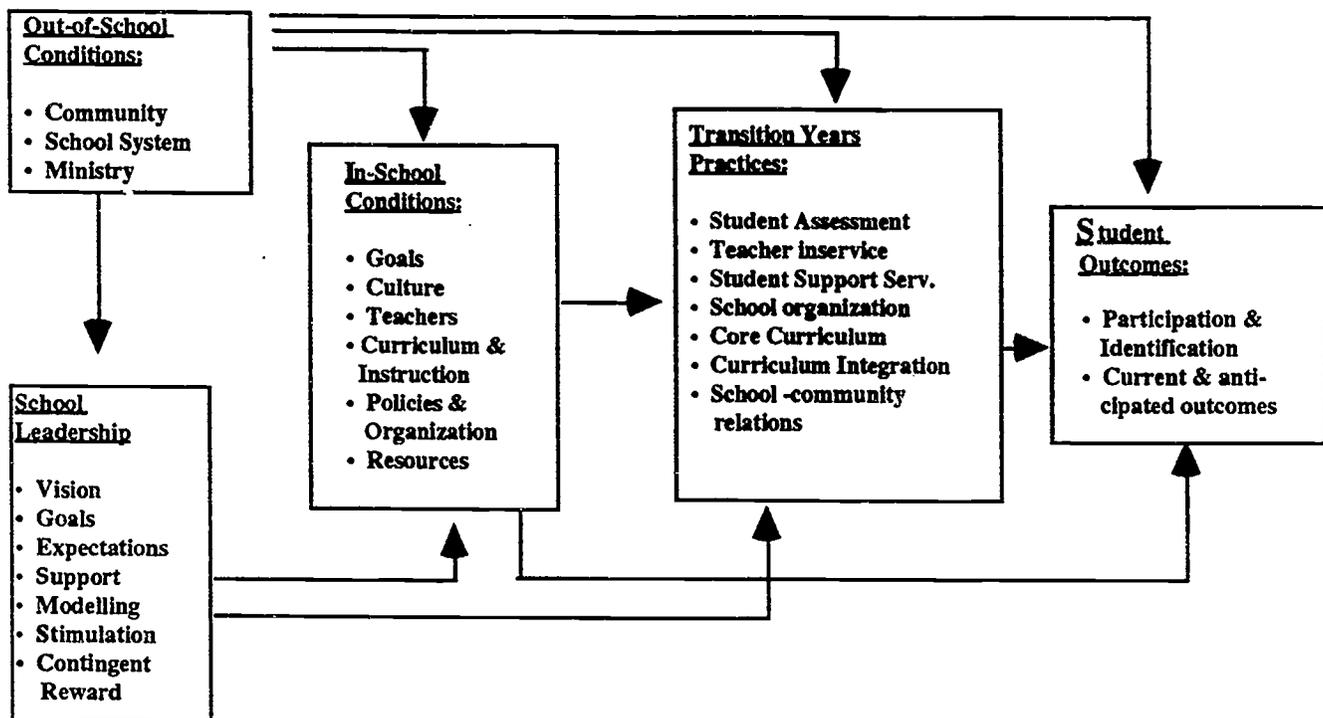


Figure 1: Conditions, Variables and relationships in a model of the school restructuring process based on commitment strategies

8.2.3 Within the school, the sources of staff motivation or commitment were identified as:

- *Goals*: the extent to which staff perceive that the goals of the Transition Years are clear and compatible with their own goals and the goals of the school;
- *Teachers*: the extent to which teachers believe that they participate in Transition Years implementation decisions, believe the Policy is compatible with their own views, and feel committed and motivated to implement it;
- *Programs and Instructions*: the extent to which the policy is perceived to be compatible with teachers' views of appropriate programs and instruction and the priority given by teachers to Transition Years implementation;
- *Policy and Organization*: the extent to which staff perceive school policies, and organization to support Transition Years implementation;

- *Resources*: the extent to which staff perceive as adequate for Transition Years implementation the financial and material resources available to them.

8.2.4 School leadership was identified as an especially powerful, potential source of commitment, in particular transformational forms of leadership. Aspects of practice associated with such leadership and examined in the study included:

- *Identifying and Articulating a Vision*: Behaviour on the part of the leader aimed at identifying new opportunities for his or her school; and developing, articulating and inspiring others with his or her vision of the future (when visions are value laden, they will lead to unconditional commitment; they also provide compelling purposes for continual professional growth);
- *Fostering the Acceptance of Group Goals*: Behaviour on the part of the leader aimed at promoting cooperation among staff and assisting them to work together toward common goals (group goals that are ideological in nature foster group identity best);
- *Conveying High Performance Expectations*: Behaviour that demonstrates the leader's expectations for excellence, quality and/or high performance on the part of staff (perhaps highlighting discrepancies between current and desired states);
- *Providing Appropriate Models*: Behaviour on the part of the leader that sets an example for staff to follow that is consistent with the values the leader espouses;
- *Providing Intellectual Stimulation*: Behaviour on the part of the leader that challenges staff to re-examine some of the assumptions about their work and to rethink how it can be performed (a type of feedback associated with verbal persuasion);
- *Providing Individualized Support*: Behaviour on the part of the leader that indicates respect for staff and concern about their personal feelings and needs;

- *Providing Contingent Reward:* Behaviour on the part of the leader that recognizes excellence, quality and/or high performance and rewards it immediately.

8.2.5 Out-of-school conditions, in-school conditions and school leadership are considered to be significant influences, both directly and indirectly, on the implementation of Transition Years practices and, partly through such implementation, on student outcomes. As Figure 1 above indicates, seven categories of Transition Years practices were examined in the study. These were categories of practices initially identified as crucial for the attention of Transition Years pilot sites by the Ministry of Education and Training; a literature review carried out by the research team identified specific exemplary practices within each category.

8.2.6 Selection and measurement of student outcomes were approached in two ways. First, teachers were asked to estimate the extent to which a set of 11 specific student outcomes, excluding specific items for French language schools, were currently being achieved and likely to be achieved in the future as a result of their Transition Years initiatives. Second, students were asked about the extent of their participation in and identification with school; students were also asked about the quality of instruction they were receiving, their ability and performance at school and of their families' educational culture.

8.3 Methods

8.3.1 Data for the study were collected through three surveys completed by staffs in approximately 325 of the 396 pilot sites in English and French language schools (approximately 1300 to 1600 individuals). The student survey was carried out with about 3500 students from 152 classrooms in the same number of schools. Analyses of the data were carried out primarily using the school as the unit of analysis. In addition to means, standard deviations and scale scores, statistical tests were carried out to determine whether there were significant differences in elementary vs. secondary school responses and responses from French language vs. English language schools. Path analyses (using the LISREL program) were conducted as a means of assessing the presence and strength of relationships assumed by the framework for the study (represented by the arrows joining boxes in Figure 1).

8.4 Findings

8.4.1 *Implementation of Transition Years Practices*

8.4.1.1 One of the surveys asked staffs to indicate how frequently they were implementing specific practices in six broad categories advocated for the Transition Years by the Ministry of Education and Training: teacher inservice, student assessment, school community relations, student support services, school and classroom organization, curriculum integration and core curriculum. Respondents were asked to complete only those categories that were being addressed in their school.

8.4.1.2 Pilot project schools were generally addressing about four categories of Transition Years practice. Teachers inservice and student assessment were being addressed in the most schools, although the extent of implementation differed, with assessment practices being most fully implemented. Initiatives related to core curriculum were selected by the fewest schools, but within those schools the extent of implementation of such practices was higher than all other practices except student assessment. Overall, the estimates of implementation were not high for any of the categories.

8.4.1.3 Providing teacher inservice was clearly a priority for pilot projects; 84% of schools reported such activities. Teacher inservice practices were perceived to be having some impact on the professional growth of individual teachers as well as enhancing the professional culture of the school. This effect on professional culture is evident in reports of some strengthening of professional relationships, administrators' delegation of leadership to teachers, and involvement of teachers in setting goals for inservice. However, the delivery of inservice appeared to be rather limited, both in the breadth of strategies used and in the involvement of teachers in decisions about how inservice could best be done. Sharing of expertise across panels also appeared not to be a significant inservice strategy. French language school respondents indicated that they often had access to inservice opportunities and to resources.

8.4.1.4 Student assessment was a popular focus for pilot site initiatives with 83% of schools engaging in activities to modify assessment and evaluation practices related to the Transition Years. Teachers attributed importance to ensuring their students were aware of what and how their teacher assessed their work. Although a variety of

assessment practices were reportedly used, the process of designing strategies and conducting evaluations appeared to be carried out largely by individual teachers working on their own. Students appeared to be the objects of evaluation rather than participants in the process.

8.4.1.5 Seventy-seven percent of the pilot projects were working to improve school and community relations. This suggests a priority for building or strengthening partnerships in the community beyond the school system. Although staff members generally felt their school was viewed favourably by their community, they continued to place emphasis on communications with, and service to, the local community. Less evident was the direct involvement of community members in school-level decisions and processes.

8.4.1.6 The implementation pattern of student support services was similar to the pattern for student assessment. There was recognition of the importance of student services within the Transition Years and in the involvement of classroom teachers and/or guidance personnel carrying out the function. The strategies appeared to focus more on individual efforts (classroom teacher or counsellor) than on group/peer counselling or cross-curricular and cross-panel efforts. In French language schools, teachers reported often encouraging students to pursue their education in French.

8.4.1.7 About two thirds of the pilot projects were addressing school and classroom organization issues. In those sites, working with heterogeneous groupings of students appeared to be a high priority. Flexibility in groupings appeared less frequent primarily because homogeneous groups were rarely used as a response to meet special needs, aptitudes or interests of students. Of course, policy makers will note that in spite of the highly visible debate in the province around "destreaming", one third of the pilot sites appeared not to be working in that direction yet. Responses by French language schools indicated that the school was perceived as promoting the "fait français" in the francophone community.

8.4.1.8 Practices related to curriculum integration tended to involve strategies enabling teachers to make links to other curricular areas, life experiences and student interests. Less common were the practices of working with colleagues or students to bridge disciplines or reducing redundancies through curriculum coordination. Practices for the core curriculum follow a similar pattern, a broad and high quality

repertoire of teaching strategies, and student-centred goals. Less evident were reduction in fragmentation of student programs and team teaching efforts.

8.4.2 *Student Outcomes*

8.4.2.1 A large sample of students (N = 3557) in Transition Years pilot schools were asked about their levels of school participation, identification with school and the quality of instruction they received: they were also asked about their family's educational culture, as well as their ability and performance at school. Teachers' opinions were also collected about the effects of Transition Years initiatives on 11 specific student outcomes, excluding 2 items for French language schools.

8.4.2.2 Among the six broad categories of issues about which students were asked, mean ratings were highest for students' judgements of their own performance and their own abilities. With respect to participation in school, lowest ratings were given to membership in school organizations and helping to decide on school rules; highest ratings were given to the importance of participating in such school events as games, dances and plays. In response to questions about identification with school, students attributed considerable importance to attachments with their peers; they also agreed very strongly that school, education and good marks were important to them.

8.4.2.3 Students' opinions concerning the quality of instruction being received suggested that their teachers had high expectations of them and that links between school work and their lives after school were apparent to them. Students were much less inclined to agree that they were constantly challenged or rarely bored in class.

8.4.2.4 When asked about their family educational culture, students agreed most that their parents or guardians always knew if they were at school, were willing to help with homework and ensured a healthy diet and adequate sleep. Much less often did students engage in conversations with parents/guardians about major world events. Nor were parents asked about their identification with French language education; most defined themselves as Francophone and Franco-Ontarian, preferring education in French at a French language school.

8.4.2.5 Finally, in response to specific student outcomes, teachers perceived that their Transition Years initiatives were having the most impact on students' attitudes

toward working with one another and on easing students' transitions into their secondary school programs. Teachers perceived least impact on reducing discipline problems and increasing clarity for students about occupational and other life goals.

8.4.3 *In-School and Out-of-School Conditions and the Status of School Leadership*

8.4.3.1 The commitment-building strategy for school restructuring used as a framework for this study identifies a number of conditions inside and outside the school as important in accounting for the success of restructuring efforts: school leadership is included in the strategy, as well. Survey data described the perceptions of staffs in Transition Years pilot sites concerning the favourableness of such conditions to their Transition Years initiatives.

8.4.3.2 With respect to the status of *conditions in schools* likely to influence the success of Transition Years initiatives, staffs indicated high levels of job satisfaction and general commitment to both personal professional development and the general purposes and means associated with their schools' Transition Years initiatives. However, they also expressed dissatisfaction with the physical facilities and opportunities for collaborative planning within their schools. Elementary and secondary schools provided subtly but importantly different environments within which to implement Transition Years initiatives. But there was no clear, overall advantage in either environment concerning the probability of successful Transition Years implementation. French and English language staffs had somewhat different views on several conditions in school. French staffs held more favourable views on their school's culture whereas English staffs were more positive about conditions reflecting teacher commitment as well as policies and school organization compatible with the Transition Years.

8.4.3.3 Concerning *conditions outside of the school* likely to influence the success of Transition Years initiatives, the status of school board conditions was perceived to be most favourable, followed by the status of Community and, finally, Ministry conditions. Among specific school board conditions, staffs were in most agreement that opportunities had been provided for teachers to work together on Transition Years initiatives. Among specific community conditions, there was most agreement about the quality of informal relations with parents and the productive use of community resources. The quality of communications between school and community about

Transition Years initiatives was considered to be problematic (less so in French language schools, however). The specific Ministry condition about which agreement was highest was adequate funding of pilot projects. But Ministry personnel were perceived to be largely unavailable for advice on planning and implementing Transition Years initiatives. French language school respondents perceived Ministry personnel to be more available than did English language respondents.

8.4.3.4 Elementary and secondary school staffs had different perceptions about the status of a number of conditions outside the school. Elementary staffs viewed more favourably Ministry documents, board staff development opportunities, cross panel work, and relations with parents. Secondary staffs viewed the use of community resources more favourably. French language staffs had more favourable views related to Ministry conditions, particularly concerning the availability of Ministry personnel for advice related to Transition Years. English staffs held more favourable views about school-community relations.

8.4.3.5 Leadership in Transition Years sites was being provided most frequently by formal school leaders. Informal leadership was also being provided by some teachers and committees set up specifically for Transition Years leadership. Secondary schools displayed more distributed, teacher-dependent and non-hierarchical forms of leadership as compared with elementary schools. Respondents were in most agreement about their leaders' provision of individual support. But this was more likely to be "soft support" — consideration, thoughtfulness — as distinct from such "hard support" as money and training. Respondents agreed least that their leaders were fostering commitment to group goals, a leadership practice that was demonstrated to have a very strong influence on conditions in schools.

8.4.4 *Explaining Variation in Progress With Transition Years Initiatives*

8.4.4.1 A series of path analyses were conducted in order to explain variation across pilot sites with respect to three different types of effects or consequences of Transition Years initiatives: the degree of implementation of each category of Transition Years practices; teachers' perceptions of impact on student outcomes; and students' participation in and identification with school.

8.4.4.2 Variation across pilot sites in perceived student outcomes and perceived levels of implementation of the six categories of Transition Years practices was explained by consistently significant and strong effects of three sets of conditions associated with the community (e.g., teachers' perceptions about the adequacy of funding) as well as the strength of the leadership provided in the school. In addition, the status of teachers' perceptions about issues regarding programs and instruction had a significant effect on the implementation of three of the six categories of Transition Years practices.

8.4.4.3 Relationships among conditions within the school were complex. Analyses suggested direct effects on the implementation of Transition Years of teachers (their beliefs about the extent of their participation in decision making, and their commitment to implementing their Transition Years initiatives), priorities concerning programs and instruction and the supportiveness of policies and organization. The perceptions of teachers encompassed within these variables were themselves influenced by beliefs about how clear and compatible were Transition Years goals with their own and their schools' goals, beliefs about how collaborative was their schools' culture and beliefs about the adequacy of available resources.

8.4.4.4 Models used to explain variation in students' self-reported levels of participation in and identification with school accounted for a substantial amount of the variation in students' participation in (55%) and identification with (64%) school. Most of this variation was explained by the direct effects of students' perceptions of their family educational culture and students' perceptions of the quality of instruction received at school. Family educational culture also had strong, positive and direct effects on quality of instruction and student participation. Transition Years practices had essentially no effect on students' levels of school participation and engagement, students' perceptions of family educational culture, or students' perception of the quality of the instruction received at school. Students' perceptions of the quality of instruction were significantly influenced by conditions in the school.

8.4.4.5 The most potent aspects of school leadership were fostering commitment to group goals, as noted earlier, and providing individualized support. School goals, culture, policies and resources were the in-school conditions directly influenced most by

school leadership. Community and district initiatives (in that order) were significant influences on the nature of school leadership.

9.0

The Qualitative Case Study

9.1. Framework

9.1.1 Accounts of the fate and fortunes of pilot projects and of the policies which spawn them must be placed within the context of the relationship between policy and practice, and the context of educational change more generally. To do this, we have used two approaches in our study: *policy-into-practice* and *practice-into-policy*.

9.1.2 Studies of policy implementation often tend to presume the paramount importance of the policy, and see practice in terms of how it intrudes upon or is interfered with by the policy. But in our study, the transition from *policy to practice* is understood to be not only linear but also interrupted, with various obstacles blocking the "path" of implementation. We call this a *policy-into-practice* approach which is one of the two ways we have used for understanding the Transition Years policy. Within this context, we begin by defining the Transition Years components, then look at how they are interpreted and implemented in different settings.

9.1.3 Our second approach begins by trying to understand teachers' (and also students') existing practice and the ways in which it is shaped culturally, structurally and historically by the demands of the workplace; by the biographies and experiences of the participants; by the careers, goals and purposes which are important to them; and by the cultures and communities of teachers or students to which they belong. We call this the *practice-into-policy* approach. Within the wider context of teachers' and students' deep-seated commitments and concerns, new policies and the demands they bring can seem but a blip on the horizons of work that have remained fundamentally unchanged for years and perhaps decades (Figure 2).

9.1.4 For change to be secured effectively, the important issue then becomes not one of supporting implementation of the specific policies (reform), but of transforming the conditions, commitments, career concerns and cultures of the workplace in order to create an environment more receptive to specific policy changes (restructuring) (see

Figure 3). The difference is between providing specific strategies for policy-implementation such as inservice training or cooperative learning, or providing materials for anecdotal report cards, and providing more generic strategies for transforming the workplace as an environment for change such as cross-panel exchanges between teachers, reducing teachers' number of contacts with students, etc.

9.1.5 Metaphorically, the difference between the two perspectives on the policy and practice relationship is one of scope and resembles the difference between a torrent on a sandhill (policy-into-practice), and a passing shower on a block of granite (practice-into-policy). Both perspectives describe important aspects of the policy and practice relationship, and both are represented with the case study component.

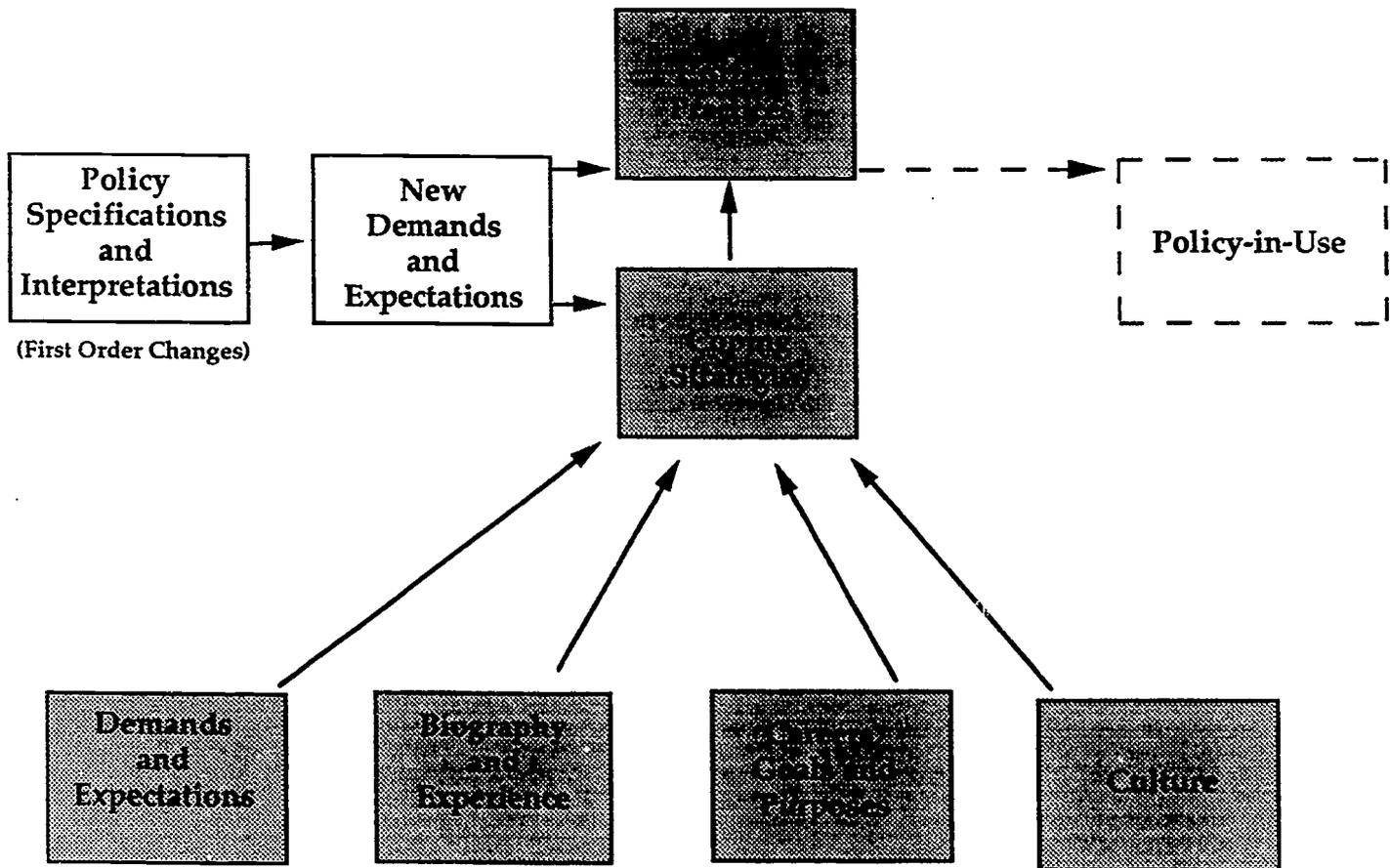
9.2 Research Design and Methods

9.2.1 The cases selected were of six schools involved in the Transition Years pilot projects. This was a large enough sample size to allow contrast and comparison among different types of settings, but small enough to be manageable given the depth and intensity of investigation in each case.

9.2.2 The six sample schools are geographically spread across Ontario; a range of urban, rural and metropolitan settings; schools which cater to students from a variety of ethnic groups, including schools with strong representation of students from native communities; schools of different age and size; and in both English language and French language schools. School sites vary between ones that focus on a very small number of the six initially stated Transition Years components, to those which address all components simultaneously. The case sample covers all Transition Years components.

Figure 2

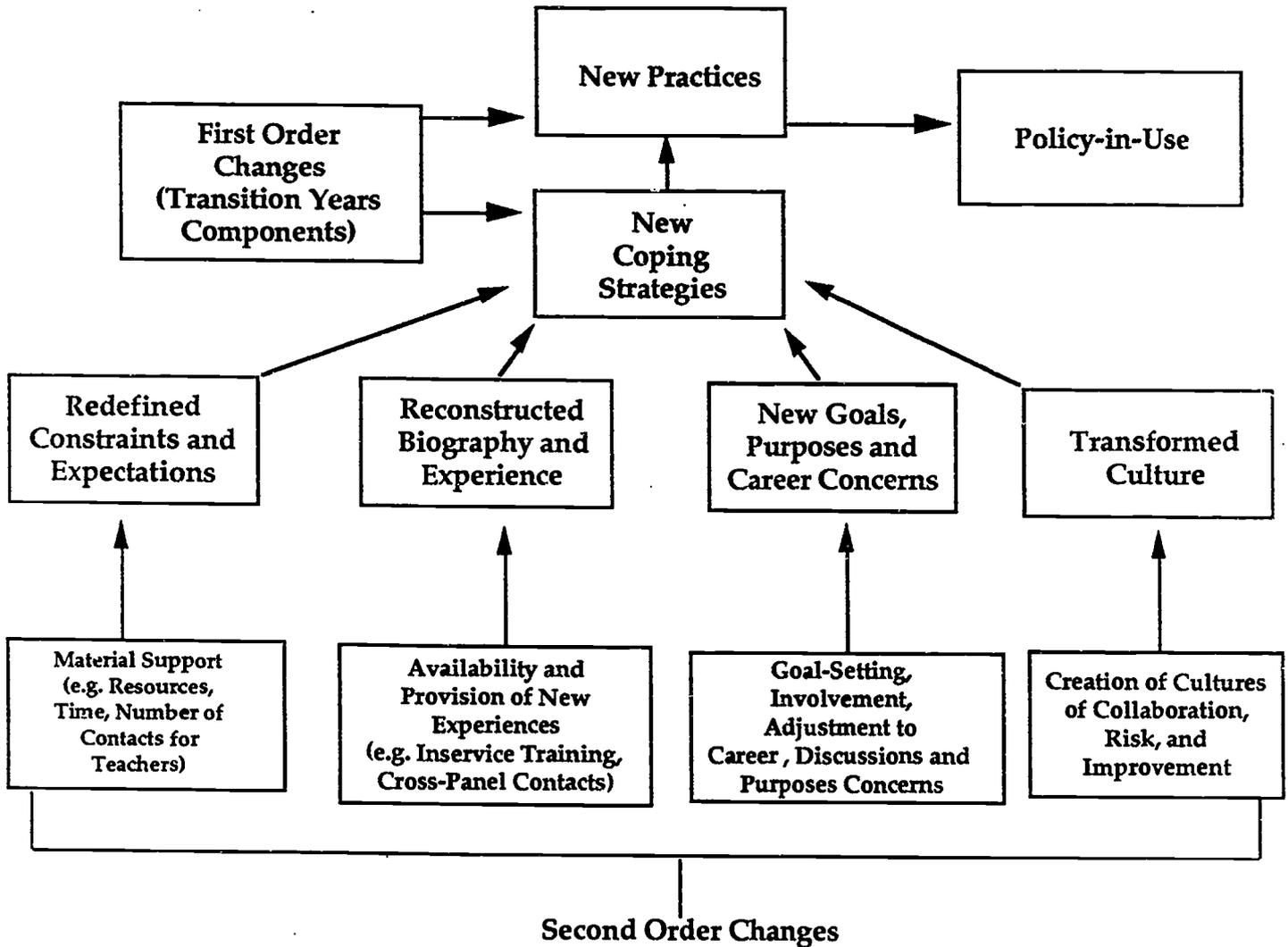
**Conceptual Framework for the Case Study Strand
(Implications of First Order Changes for Policy-in-Use)**



This theoretical framework of the impact of first-order changes alone, illustrates how the policy-in-use becomes shaped and diluted through the absorption of the change by current practice and its powerful institutionalized determinants in constraints, biography, careers and culture.

Figure 3

**Conceptual Framework for the Case Study Strand
(Implications of Second Order Changes for Policy-in-Use)**



This theoretical framework of the impact of second order changes alone illustrates how new practices can be created by acting on the 'deep' factors that currently determine teachers' coping strategies, i.e. constraints, experiences careers and cultures.

9.2.3 While the details of data collection varied from case to case in order to be sensitive to the unique nature of each case, many aspects of the research design were common across all cases:

- In all cases the most intensive period of data collection was February/March 1992, with supportive data being collected at other points;
- All cases were studied by teams of at least two researchers to increase the depth of study and understanding, and provide a basis for validity checks between researchers;
- All cases are essentially detailed, fine-grained snapshots of pilot projects in action at one point in their development, rather than sketchier, coarse grained studies of a more longitudinal nature;
- All cases involved semi-structured interviews with school principals about the nature and progress of the pilot projects, and about their own perspectives, biographies and careers more generally (in order to accommodate the *policy-into-practice* and *practice-into-policy* dimensions of the study);
- All cases involved individual semi-structured interviews with approximately 8-12 teachers about the nature and progress of the pilot projects; their own perspectives, biographies and careers; and about the day they had just experienced. These individual interviews were supplemented with focus group interviews with the same teachers in order to cross-check accounts, and develop discussion and analysis of issues emerging from the individual interviews;
- All cases also involved semi-structured interviews with individual and focus groups of Grade 9 students;
- Both French language cases involved semi-structured interviews with focus groups of parents;
- All cases involved intensive observations of a full school day of each student and many of their teachers who would be interviewed;

- All cases involved collection and analysis of relevant documents about the school in general and the pilot project in particular.

9.2.4 All interviews were taped and fully transcribed. Fieldnotes were converted into legible and usable forms as soon as feasible after their collection. Draft case studies were developed from these transcripts and fieldnotes by each case research team. These were then shared with the qualitative research group as a whole and were the basis for the themes developed for further exploration.

9.3 Findings

9.3.1 *Transition Years initiatives involve much more than destreaming.*

Most case study participants recognize that Transition Years initiatives are not synonymous with destreaming and indeed extend far beyond it. These initiatives, they recognize, involve fundamental changes in how teachers work with their students, with their colleagues and with their community. Indeed, reconstructing these relationships, and the principles of communication and power they have come to express, is at the very heart of restructuring. Destreaming is one part of this complex puzzle, but one part only. Its relative importance among the many Transition Years initiatives should therefore not be exaggerated or treated as exceptional in policy or in practice.

9.3.2 *The Transition Years initiatives involve teachers in different places of learning.*

The breadth and depth of the changes implied by the Transition Years initiatives can be expressed and embedded in four contexts: classrooms, corridors, backroom (or staffroom) and community. Focused as they might be on the staffrooms, the classrooms, the corridors or the community, each teacher might be at a very different point of learning and change. The result could well be a different learning place for everyone.

9.3.3 *The major changes in the case study schools have been in corridors and backrooms more than in classrooms and the community.*

Only three of the six case studies include schools which are actively engaged in changes within three or all four of the contexts. In two of the other three, the schools are either poised or preparing to move on more components of the Transition Years initiatives. In the last case study, the focus was mainly on changes in just one of the four contexts

described above. All schools are making progress in helping students prepare for and adapt to the transition from elementary to secondary school (in the corridors) and in bringing teachers together to make decisions about the content, pace and form of the changes (in the backroom). Evidence of changes in the classrooms and in the community, though present in some cases, is at best uneven. Some schools are in the early phases of change in classroom practices and community relationships, and other schools are not addressing these areas at all.

9.3.4 *Teachers cope best with unclear or uncertain changes that threaten their identities and senses of success when they respond to them collectively and concretely.*

Teachers in the pilot projects are in the midst of career transition. They are working through implications of changing their professional perspectives and practices. Restructuring offers teachers opportunities to experiment and to innovate. It also threatens positions that are familiar and strategies which they may regard as having worked in their careers to date. For many teachers, restructuring bears the threat of inefficiency, inadequacy and incoherence. In a context of increased cultural and social diversity and of ever more inclusive approaches to teaching children with special educational needs, streaming has provided some teachers with an organizational strategy for acknowledging and containing the range of ability in any one classroom and for setting up distinct academic paths towards particular careers. In streamed settings, both teachers and students know clearly where they are going. Destreaming takes this comfort and certainty away. Similarly, in the case of curriculum integration, after years of training and socialization in a subject culture and all its assumptions, teachers have little practice in conceptualizing and delivering their courses within blended formats. They are often confused about the meaning of destreaming and integration as a result.

Working closely with colleagues in cross-disciplinary and in one case, cross-panel teams, removes some of the concerns about and alleviates many of the uncertainties surrounding integration, and indeed destreaming. Within teams, integration is more about building professional relationships than breaking down philosophical and epistemological walls. In this respect, the most important benefit of integration is not so much that it brings together material, but that it brings together people, people who develop shared understandings of and responses to students' needs. However, the

attraction and historically embedded pull of subject departmentalism is so strong, that efforts at integration within one grade will be hard to sustain in any individual school, unless they are protected by directive and supportive frameworks that have legislative power behind them.

9.3.5 *Without active involvement in innovation, students are among the most powerful protectors of the past. Their voices on the realities of restructuring are privately strong, but publicly silent.*

Many students eagerly look forward to a secondary school with more choices, discrete subjects, a rotating schedule, streamed courses, and a new combination of students in each class. Cohorts, destreamed courses, and integrated subjects are not what they want or come to expect from a secondary school. These students want the secondary school to make good on its historical promise of difference to offer a clear *rite de passage*. Regardless of their awareness of impending or actual changes in classroom practices, most students are protectors of the past. They want to preserve the traditional differences between elementary and secondary schools and the enduring patterns of classroom life with which they are familiar. When school remains predictable, students can adapt quickly to its routines and get on with the more important social transitions in their lives. They resist changes which may disrupt their proven strategies for coping with school, a perspective not unlike some of their teachers. Change is a problem for students as much as it is for their teachers.

9.3.6 *The process of restructuring has little value without appreciation of its purpose.*

Purpose is central to educational change and restructuring. Our case studies clearly show that responsibility for developing and reviewing a sense of purpose does not and, perhaps should not, fall solely or even mainly on the shoulders of government, but works best when it is actively created and sustained by teachers and school themselves. Several schools in our sample had a clear, well developed, and collectively shared sense of purpose. These included commitment to principles of servant leadership, building Franco-Ontarian identity, reviewing the school and its importance in the community, and establishing a new school that is intentionally very different from the mainstream in its principles of teaching and learning. These schools were, in the main, the ones best fitted to take the implementation of Transition Years initiatives from the backroom to the classroom. Developing a clear mission and sense of purpose that is inclusive of all

students in the school (and not just the most academically successful) is a necessary context for implementing Transition Years initiatives, and needs to be attended to prior to and during the implementation process itself.

9.3.7 *Restructuring should involve teachers working collaboratively to effect continuous change themselves.*

The paradox of school restructuring and reform is that while teachers are the keys to educational change, they are also often the bolts that keep the windows of educational opportunity tightly shut. Teachers' knowledge of their students and their familiarity with the contexts in which they work, make them indispensable to the change process and create strong grounds for their active involvement in policy-making, especially at the site level. Such involvement will also help transform teachers' resistance to and resentment about change, much of which is less concerned with the change itself, than with the change being distant, unclear and imposed upon teachers who have been uninvolved in its development. Securing greater participation among teachers may mean more than involving a representative few who participate in decisions that are then imposed on their colleagues elsewhere. It also means creating models of policy-making at the school or local level which include many teachers in ways that impact on their own workplaces.

9.3.8 *The partnerships that form the base of restructuring need to extend beyond teachers to students and parents as well.*

As yet, most students seem to be little more than beneficiaries of change, playing little or no part in restructuring. If students were actively involved in learning about and participating in the change process, they could influence how their classroom interactions develop. By negotiating a different working relationship with students, teachers could simultaneously exemplify and stimulate further reform. We found that teachers seem more ready to *inform* students about innovation, than to *involve* students in decisions about what form the innovation should take, or how it might be altered.

Teachers also need to create a more secure and interdependent base of accountability to parents and the wider public. In addition to establishing more reciprocal bonds among themselves within the educational community (professional accountability), teachers need to establish more cooperative associations with students and parents (moral accountability). Great strides have yet to be taken on the road to parental involvement.

Where schools *had* established strong relationships with parents and meaningful forms of reporting about their children's progress, parents were knowledgeable about and supportive of Transition Years initiatives.

9.3.9 *Restructuring requires not only commitment to collaboration. It requires creating workplace conditions which make collaboration meaningful and possible.*

Restructuring, in this sense, involves building new patterns of commitment and communication, and new relationships of power among those most centrally involved in and affected by schooling in the Transition Years. Its purpose is to create new conditions and ground rules for teachers, who, in more active partnership with parents, students and each other, will make the necessary improvements in education themselves, on a continuing basis. Some of our case studies portray constructive examples of such restructuring in action. For example, when teachers had the time and opportunity to work with destreaming, experience it, deliberate about it, inquire about and modify it, they developed a more sophisticated understanding of its complexities and possibilities. Only with more enabling workplace conditions can teachers build a better mutual understanding of instruction and improve practice through collaboration.

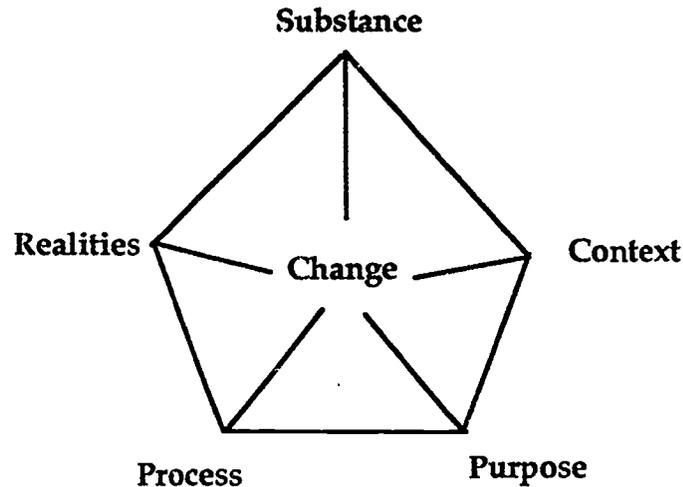
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Conclusions

10.1 In our review and analysis of the pilot projects, we have focused on a study of change. The findings contribute more to the debate about policy formation and implementation in the Transition Years than to the assessment of particular components such as curriculum integration or destreaming.

10.2 Our conclusions then focus on general observations about five key dimensions of change. For a more extended report and discussion of the results, see Sections 8 and 9 of this volume and Volumes 2 and 3. The five dimensions of educational change provide a template for understanding the nature of reform and restructuring through Transition Years initiatives. (Figure 4).

Figure 4: Dimensions of Change



The *change context* (described in Sections 1, 2 and 3) refers to the social and historical forces that drive educational change. This we locate in the contemporary context of economic and occupational flexibility, technological complexity, cultural diversity, scientific uncertainty and organizational fluidity of postindustrial society; in the varied and competing strategies used to reform schools; and in the historical ebb and flow of policy debate and practice in Ontario. These forces both expose current school structures as increasingly inappropriate to present times and influence the shape and direction of the Transition Years initiatives.

The *change realities* refers to actualities of change in people's behaviours and perspectives. They are multiple and complex. They differ between and among administrators, teachers, students and parents, depending on how the groups experience change and how they are positioned in relation to the change as it affects them. These realities are the source of our findings and conclusions in *change substance*, *change purpose*, and *change process*.

10.3 Change Substance

10.3.1 The six components of the Transition Years initiatives (teacher inservice, student assessment, school community relations, student support services, school and classroom organization, and curriculum integration and core curriculum) call for a complex and fundamental changes in classroom and school practice. They involve new teaching practices (e.g., core and integrated approaches, responsive methods to students of different interests and abilities, and varied assessment and evaluation techniques), more extensive orientation and support programs for students (e.g., career education, linkage strategies, mentoring), flexible and cooperative structure for teachers (e.g., multidisciplinary staff cohorts, elementary-secondary liaisons, cross-panel teaching, shared planning time), and elaborate and intensive relationships with the community (e.g., communication system, school council).

10.3.2 With the exception of student assessment and evaluation, most of the pilot schools in the study were focusing on changes outside the classroom – teacher inservice education, school and community relationships, and student support services. Many of these schools chose to make changes and to devise strategies which were compatible with their existing operation, had considerable support from the staff and parents, were “doable”, and had a good chance of early and visible success. For example, many schools increased their efforts to improve the transition from Grade 8 to Grade 9 (e.g., information sessions, visits to the secondary school, orientation activities). Staying with the familiar, however, also meant that most strategies for change were fairly traditional (e.g., after-school workshops and professional development days in teacher inservice education).

10.3.3 In a number of schools, classroom-based changes in, for example, organization (e.g., destreaming) and core and integrated curriculum were in the early stages of trial or still being debated. Mini-schools, sub-schools and cohort systems for Grade 9 create real possibilities for community and seem to be successful in combatting the impersonality and fragmentation that secondary schools can otherwise create for their students. At the same time, many students saw these arrangements as condemning them to repeating a Grade 8-like experience, removing from them the opportunities for greater choice and wider contacts, and denying them the proper *rite de passage* which they expected secondary schools to provide. On the basis of our evidence, efforts at

restructuring Grade 9 have yet to strike the right balance between *community* and *monotony*. The challenge here is to create an experience of Grade 9 that is sufficiently common, caring and inclusive so as to counter the traditional problems of fragmentation and impersonality of secondary schooling, while incorporating enough elements of choice and diversity, and enough changes in program and instruction, to convey to students a substantial sense of progression from Grade 8.

10.3.4 The critical influence of family on student participation in and identification with school suggests a greater role for parents in the education of their children. Where family circumstances warrant it and where parents/guardians welcome it, schools should devote a much larger proportion of their efforts to assisting families in providing the most productive family educational cultures possible. Parents and other members of the community also should be actively encouraged to assume school-level decision-making and governance roles much more frequently than seems to be the case at present.

10.3.5 Overall, the findings in the two French language case studies were similar to those in the English language cases, except with regard to parents and to the vision of the future. In the first case, parents were not involved in the decision to implement the project and expressed strong opposition to it initially through the local press. They felt the project was being forced upon them by the school system. In the second case which was different from the other pilot projects, parents were involved in the decision making process from the beginning and supported the project throughout its life. This second case was also unique in our study in the sense that it was designed to fit into and advance a larger vision that had widespread support within the francophone community.

10.4 Change Purpose

10.4.1 The major purposes for Transition Years initiatives require further clarification from policy makers and further negotiation and refinement in schools. More attention should be devoted to clarifying the major purposes to be accomplished by and for students as a consequence of the Transition Years initiatives. Particularly important for anticipated change are the contributions of the Transition Years components, themselves, both individually and collectively. When asked about the basic intentions of their initiatives, some teachers were confused or unaware. Some perceived as

relatively unlikely, for example, that their efforts would: reduce discipline problems and incidences of suspension; increase clarity on the part of students about future educational aspirations and life goals; reduce the number of dropouts; or provide for the academic success of a larger proportion of students than has been the case previously. (Admittedly, concern about these goals were among the major stimulants initially giving rise to the Transition Years initiatives.) Instead, teachers believed their efforts were most likely to result in more positive attitudes of students toward school, growth in self-concept and greater cooperation among students during their school work. While these goals are laudable and perhaps represent early steps toward other goals, most certainly they were not among the fundamental concerns resulting in the political will and additional resources driving the Transition Years initiative. A clarification of purpose by policy makers, then, will give teachers a reference point against which to compare and assess their activities.

10.4.2 Schools where teachers had a clear and common sense of purpose were schools where progress in implementing Transition Years initiatives was most advanced. In some cases, this sense of purpose preceded the pilot projects; in other cases, the sense of purpose evolved in relation to the goals of the various components. The responsibility for developing and reviewing purposes must be shouldered by teachers themselves (as well as others) as an exercise in sustaining commitment, rather than expecting purposes only to be enunciated with unambiguous explicitness in the papers and policies of government.

10.4.3 The case studies reveal purposes of various scope. Administrators and teachers on several of the cases defined their purpose in terms of the implementation of specific Transition Years components. In these instances, local participants had not formulated an overall understanding of the Transition Years restructuring initiative at the time of the study. They saw themselves as implementing the Ministry's pilot projects without having clearly defined long range goals. In contrast, however, the case of École secondaire du Sud-Ouest illustrates a broader sense of purpose and approach. This pilot project was not conceived and implemented as an end in itself, but rather as a means to achieve a larger vision. The project involved more than the simple transition of students from elementary to secondary school. It contributed to the development and implementation of a vision about Franco-Ontarian identity that went beyond the school context. The sense of purpose was understood and shared by all the project's

participants, from teachers to parents. This consensus among stakeholder groups helped to facilitate the implementation of the Transition Years initiative. Significantly, the project continues even without additional money from the government.

10.5 Change Process

10.5.1 Restructuring is ultimately about reconstructing relationships of communication and power within and around our schools in order to create better learning for students on a continuous basis. More collaborative working relations among teachers were widely established in the pilot project case study schools and had positive implications for the implementation of Transition Years components. Inclusion of parents in the development of policy and change had similarly positive effects but was less common. Including students in innovation was the rarest practice of all, but in the one case where we saw it, had highly positive consequences for building student commitment and creating teacher learning. Pilot project schools appeared to be taking promising steps toward building more collaborative communities among teachers. The inclusion of parents and students in the process of development and change, however, remains relatively rare but of considerable value.

10.5.2 Some schools used a large-but-few change strategy and other schools used a act-small-think-big change strategy (Fullan, 1991). A few schools that started on many fronts before they were ready experienced exhaustion and disillusion, and a few schools that started small and stayed small had no anxieties about the initiatives (and little evidence of significant change). Beginning modestly and in familiar territory (e.g., planning, additional inservice sessions) makes sense especially if the school has no tradition of reform. But, even in the early rounds, teachers must have the classroom and community in sight if they want to make a difference in the lives of their students.

10.5.3 For many participants in the case study schools, the proposed changes for the classroom are the most significant, and sometimes most controversial of all. Teachers, in particular, have numerous concerns. While their views range from outright opposition to enthusiastic endorsement of the changes, most of the teachers recognize the immense challenge ahead and the need for considerable time and resources, both human and material. Until the scale for support matches the magnitude of the change, many teachers are hesitant to take the initiatives from the backroom and corridors into new territory.

In some schools, additional resources were needed to mobilize the staff and "jumpstart" the change process. Other schools moved forward by redirecting or creatively using available resources. A number of schools expressed few concerns about resources and instead concentrated on developing the conditions and working relationships to support their change agenda. Clearly, in schools where teachers were regularly involved in and committed to improving their practices, the availability of additional resources was an important but not determining factor in their effort to bring about meaningful changes through the Transition Years initiative.

10.5.4 Forms of school leadership often referred to as "transformational", "educative", or "facilitative" were a powerful source of productive change in the pilot schools. Among the most important of the practices associated with such leadership were working with staff and others to develop and refine continuously a vision for the school and to clarify the goals and priorities for action to help move toward that vision. As with most other recent research in restructuring schools, providing personal and professional support to individual staff members was also very helpful; this meant both psychological support (respect, caring, sensitivity to teachers' needs, for example) and more tangible support in the form of planning time, instructional resources and the like.

10.5.5 Transformational forms of leadership were most often provided by those in formal school leadership roles – principals, department heads, for example. But there were many instances of such leadership being provided informally by teachers. If restructuring schools depends significantly on redistributions of power and responsibility, it will be important for many schools to distribute leadership more broadly throughout members of the school community. This, in turn, will require those in formal leadership positions to reconstruct their roles.

10.6 Promising Changes, Changing Promises

We end with a satisfying sense of early success, yet with a sober awareness of the daunting challenge of extending this success into more classrooms in the pilot project schools, and into more schools beyond them. As strategies become more inclusive (with more students, parents, community members involved in more elementary and secondary schools), more concentrated (innovative "bundles" of components), and more collaborative (shared decision making, enabling structures), the Transition Years initiatives will become Transition Years accomplishments. In the process of building on

these promising changes in progress, we will discover the changing promises of the next policy initiative.

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