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**POLITICS OR PEDAGOGY?**

**THE DEVELOPMENT OF MIDDLE SCHOOLS  
IN NEW ZEALAND**

A thesis  
submitted in fulfillment  
of the requirements for the degree  
of

Doctor of Philosophy

at the  
University of Waikato

by

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2004

The University of Waikato  
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## **ABSTRACT**

The development of eight New Zealand middle schools during the 1990s was both a continuation of a long held educational tradition and a move in a new innovative direction. The extent to which this development however, was pedagogically driven or politically motivated deserves investigation.

New Zealand's educational community, since the very beginning of a national education system in 1877, has been predisposed to meeting the needs of emerging adolescents in stand-alone institutions. The development of such educational institutions as; central schools, junior high schools, intermediate schools and latterly middle schools, tend to the conclusion that students in their middle years require a school structure that best caters for their specific needs as emerging adolescents.

The reform years of the 1990s also provided a political environment conducive to educational change. The policies derived from the introduction of *Tomorrows Schools* and the concepts of parental choice and school competition provided a political environment open to educational innovation. Research evidence gathered from those principals who remain as leaders of the first middle schools made particular mention of the entrepreneurial opportunities provided in the 1990s.

This was also a decade where policy importation, particularly from the American educational community, was both encouraged and made easier by developments in communication and international travel. The junior high school reform movement and the development of American middle schools supported by such associations as the National Middle Schools Association (NMSA) provided a conduit for research articles, practices and experiences to permeate the New Zealand intermediate school environment.

This political environment was further supported by the growth in research literature on adolescence, and in particular the development of a concept of "the emerging adolescent." Research from the biological, psychological and

sociological disciplines each supported the concept of specific educational programmes delivered in age-specific institutions that could best cater for the needs of this specific age-group. In particular sociological research findings suggested the development of age-appropriate school structures would have beneficial effect on student achievement.

The development then of a uniquely New Zealand middle school structure, created in a political and pedagogical climate conducive to meeting the needs of the emerging adolescent, led to prolonged debate concerning the ideal structure for such an institution. In particular the debate concerned whether the middle school should evolve from its intermediate school heritage or should be part of a Form 1 to 7 school structure. This debate, and the related interest in middle schools compared with junior high schools, was undertaken by a number of New Zealand educationists and researchers. The research of a single middle school case study, that of Sunset Junior High School, in this thesis enabled a full investigation of the various tensions that existed concerning middle school development. This case study could be considered to be a microcosm of the national community.

The implications of this study therefore suggest that as with the development of most educational structures the reality is one of cost effectiveness. The declining demographics of New Zealand's school-aged population and the current school network discussions (previously called Educational Development Initiatives (EDI)) suggest that the cost effective reality for New Zealand will be the development of separate Form 1 to 4 and Form 5 to 8 schools on one school site. How the management of these two schools on a single site will be created will, of itself, be in the nature of a trial and a further evolution of the middle school philosophy.

## **ACKNOWLEDGEMENTS**

My sincere appreciation is extended to Greg Lee and Deborah Fraser for their support, encouragement and academic challenge over the last few years. Their support has greatly assisted me throughout the process of creating this thesis. I am fortunate to have had the opportunity to learn from them. Initially, this journey began with the support and guidance of Martin Thrupp, and much of the structure of this thesis is due to his early involvement. The support and encouragement offered by the University of Waikato enabled me to undertake this project as a part-time student, something I will always be grateful for.

This endeavour would not have been possible without the generous support of the Kaitao Intermediate School Board of Trustees in the first instance and the encouragement of my colleague Rory O'Rourke. His vision for middle schools inspired me to begin this academic challenge. In the second instance the ongoing support of the Mokoia Intermediate School Board of Trustees and the long suffering patience of the Mokoia School staff have provided me with the opportunity to make practical use of the ideas I have discovered whilst involved in the readings.

The use of a Teacher Study Award, presented jointly by the NZEI, PPTA and MoE, provided one terms release from school which enabled the first draft of this thesis to be written. I wish to thank Liz Little and Nick Brell who took over the helm of Mokoia Intermediate, so professionally, in my absence.

Furthermore, I owe a sincere debt of gratitude to my colleagues who gave so generously of their time and ideas, or who listened to my thoughts. David Crickmer, John Crone, Allan Dennis, Anne Milne, Trevor Rowse for their interviews; and Mollie Neville, Geoff Treanor, Daphne Papuni, and Russell Bishop for their valuable insights into this work while it was in progress. I have been enriched by each and every ones knowledge and insights, although the errors remain my own.

I wish to extend a very special thanks to those family and friends who were a source of encouragement throughout the years of writing and researching this work. In particular, I would like to mention our Saturday walking group, Betty and William McDonald, Liz and John Ryan, and family, Paull and Kathy Christensen and thank them for their long term interest.

The dream to undertake this project has been a long held one, kindled by the early and ongoing support of my parents, Lionel and Dorothy Hinchco. For them this is the reward of a belief they have always held in education.

Finally my sincere thanks go to my wife, Selena Hinchco who never stopped believing in me, and was always there when the going was at its hardest.

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## **Introduction**

The provision of schooling for emerging adolescents in New Zealand is an issue of contentious debate within the educational community, a debate which has persisted since the earliest years of a national schooling system. Therefore, the development of the first seven stand-alone middle schools<sup>1</sup> in New Zealand, during the decade of the 1990s, warrants detailed research, in order to understand these influential issues. As the English educationist, Andy Hargreaves (1986) stated:

Middle schools are worthy of attention as they are situated at the point where pressures from the upper and lower ends of the educational system meet; where tensions and contradictions which beset the system as a whole are subject to conflict and debate at a level of both policy and practice.<sup>2</sup>

This thesis investigates the development of three-year and four-year state middle schools in New Zealand during the 1990s both as a continuation of a long held tradition and as a move in a new and innovative direction. It includes an analysis of the tension and balance that existed between political and pedagogical pressures on the development of middle schools during this period. Furthermore, the extent to which this development proved to be problematic in New Zealand is one of the themes of this research.

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1. An eighth middle school, Southern Cross Middle School, in Auckland was also created during this period as part of an educational campus that spanned the compulsory years of school education (Years 0 to 13).

2. Hargreaves, A. (1986). *Two cultures of schooling: The case for middle schools*. London: Falmer Press, p.1.

A qualitative research methodology has been employed, wherein the researcher was required “[to] get close enough to the people and the situation being studied to personally understand in depth the details of what [was] going on.”<sup>3</sup> This methodology included gathering descriptions of settings, key people, politics, controversies and interactions — including recording direct quotations — which captured the dynamic nature of the New Zealand middle school movement.<sup>4</sup> This inquiry approach gave rise to an inductive research strategy which in turn permitted the generation, and the later confirmation of, theories that emerged from close involvement and direct contact with New Zealand middle schools.<sup>5</sup>

A blended theoretical approach has been adopted, drawing upon the disciplines of: historical research; biological, psychological, and sociological understandings of emerging adolescents; political science, and educational research more broadly. This has necessitated the use of literature reviews, interviews, and international and New Zealand case study material. As a leading American educational researcher, John Wilson (2003) stated: “Any major topic for such [detailed] research is likely to require the input of more than one discipline, hence some kind of interdisciplinary structure is necessary.”<sup>6</sup>

The multidisciplinary nature of this thesis meant that I have chosen to incorporate the discussion of methodology early in each chapter, in preference to adopting the more

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3. Patton, M.Q. (1990). *Qualitative evaluation and research methods*. Newbury Park: Sage Publications, p.32.

4. Patton (1990), p.32.

5. Patton (1990), p.153.

6. Wilson, J. (2003). Dumbing down educational research. *Educational Research* 45, 2, p.125.

usual approach of including one chapter that solely discussed methodology. Within this context, therefore, an interpretive paradigm was followed with “the central endeavour [being] to understand the subjective world of human experience.”<sup>7</sup> In so doing, an attempt has been made to include understandings of, and to synthesise research findings from, the range of different disciplines examined. This study was undertaken in the desire to examine the “middle school” concept as a schooling structure both in an historical and in a contemporary context, within New Zealand and internationally.

My own educational experiences have been of various schooling structures for the emerging adolescent. As an adolescent, I was a student of a relatively rare New Zealand middle school structure, that of a Year 6 to Year 8 middle school.<sup>8</sup> Anecdotally, in my experience, parents enrolling students at intermediate schools frequently refer to these years as the most enjoyable and challenging that they had had at school. Subsequently, and for similar reasons, I have taught for more than 20 years within three different types of schools,<sup>9</sup> each of which articulated the belief that they catered specifically for the needs of this particular age-group. In 1993 I was appointed to the position of Deputy Principal of Kaitao Intermediate School, Rotorua and in the mid-1990s this school attempted to become a middle school. In the late-1990s I wrote extensively on intermediate and middle schools in such educational journals as *Education Today* for the New Zealand and international communities.

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7. Cohen, L., Manion, L., & Morrison, K. (2000). *Research methods in education*. London and New York: Routledge, p. 22.

8. This was a catholic boys middle school which was a common structure in the, then, private catholic school system but unheard of in the state education system.

9. These three structures include three two-year intermediate schools, a Form 1 to 7 High School, and a Year 6 to 12 Comprehensive in Cheshire, England.

Furthermore, as principal of a Rotorua intermediate school (since 2000) I have been a participant-observer at several New Zealand Association of Intermediate and Middle Schools (NZAIMS) conferences and have engaged in discussions concerning the development of a new philosophy for this organisation. I have presented a number of papers at New Zealand middle school conferences, as well as at other teacher professional development meetings and delivered papers as a guest lecturer in the Massey University diploma course on middle schooling. Therefore, as a researcher in this field I have, in Patton's words "a personal experience with and intense interest in the phenomenon under study."<sup>10</sup>

Because this thesis is concerned primarily with the heuristic concerns of "meanings, not measurement; with essence, not appearance; with quality, not quantity,"<sup>11</sup> it has developed from qualitative experiences, including interviews and case study material, rather than quantitative data. My professional work within intermediate and middle schools meant that I had ready access to the primary source data and interview material which forms part of this investigation. Not surprisingly, my experience in these sectors may be seen as biasing me towards certain school structures to the detriment of others. While every attempt has been made to maintain empathetic neutrality to this research, a researcher's personal experience cannot be ignored altogether.

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10. Patton (1990), p.71.

11. Patton (1990), p.71.

The central argument that this thesis investigates is an analysis of the balance and tensions that contributed to the development of middle schools in the 1990s – were middle schools a school structure based on sound pedagogical principles, or were their development largely a result of political motivations and influences? This thesis explores both pedagogical and political factors and explores the nature of the relationships that existed between the two.

The provision of age-appropriate schooling for emerging adolescents, it will be demonstrated, has a lengthy history in New Zealand, notwithstanding some vigorous debate. A significant part of this study therefore, involves a discussion of the development of middle school structures historically within the New Zealand educational system. This required an extensive historical review of source material, primary and secondary, followed by an investigation of the concept of a developmental stage called “emerging adolescence” that drew on the literature from biology, psychology, and sociology. This investigation revealed that the strongest argument for a distinctive age-group labelled emerging adolescent was made by sociologists.

Therefore, in determining from a sociological perspective the most appropriate school structure for young adolescents an international literature review of the various schooling structures that exist for this age-group was undertaken. The reviews of the international and national research on age-appropriate school structures was supplemented by interviewing five New Zealand principals; three middle school

principals and two intermediate school principals. The middle school principals were selected on the criteria that they had been principal of their intermediate school prior to, then during the transition to middle school, and were still principal of that school in 2002. Their transcribed interviews, which appear in the appendices to this thesis, investigated the motivations, both pedagogical and political, that influenced them as leaders of their respective schools.

The intermediate school principals interviewed were the only two to respond to a request for current intermediate school principals opposed to middle school development to contact the researcher. The purpose of limiting this aspect of the interviews to only intermediate principals opposed to middle school development was to examine the effects of local environments on the same pedagogical and political pressures that had informed their colleagues in similar institutions and time period.

Furthermore, a case study approach was taken to the development of middle school issues as they occurred in Rotorua city. An analysis of local and national newspaper clippings, covering principally the four year period 1994-1998, was the foundation of the material used. This city was selected as a case study because the debates between politics and pedagogy were played out publicly in the media. Unlike any other New Zealand middle school example, this development resulted in a ministerial moratorium on any change of school structure for the 43 schools of the city for a five year period. As Robert Burns (2000) has stated “most case studies lie within the realm of qualitative methodology. Case study is used to gain in-depth understanding replete with meaning for the subject, focussing on process rather than outcome, on

discovery rather than confirmation.”<sup>12</sup> Similarly, the variety of institutional structures established in Rotorua city highlighted important aspects of the process used to establish middle schools in New Zealand. These three research methods, literature reviews, interviews, and case studies, informed an extensive investigation of many of the pedagogical issues concerning middle schools in which the differences between the assertions of middle school proponents and the realities of middle schools as they exist in the New Zealand context were analysed.

A study of the New Zealand political environment of the 1990s has also been undertaken. This investigation examined firstly, the broader implications of national educational politics. The decade of the 1990s was one of intense reform, particularly of aspects of educational administration and the attempt by politicians to re-position education as part of a quasi-market paradigm. Secondly, the impact of local political issues are analysed in the case study of Rotorua city. This analysis enabled comparisons to be drawn between the tensions that existed owing to the pedagogical and political pressures that have influenced the development of middle schools in this country.

Therefore, the five key research questions that underpin this thesis are:

1. What historical antecedents to the “middle school” structure have existed in the New Zealand educational environment?

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12. Burns, R.B. (2000). *Introduction to research methods*. (4<sup>th</sup> Edition). Frenchs Forest, NSW: Pearson Education, p. 460.

2. How do the various New Zealand middle school structures compare with those internationally?

3. Why has the development of New Zealand middle schools during the 1990s proven to be so problematic in relation to overseas experiences?

4. What is the nature of the relationship between the political and pedagogical pressures underpinning the development of New Zealand middle schools?

5. Where might middle school development lead in the future for New Zealand and what are the implications of these possible futures?

In order to address these questions this thesis is set out in the following structure. Chapter 1 describes the historical development of various structures of schooling for New Zealand's emerging adolescents from 1877 to the early 1990s. Chapter 2 investigates the development of the country's first seven stand-alone state middle schools during the 1990s, and explains why this decade was conducive to the development of middle schools.

Chapters 3 and 4 investigate some of the assertions of New Zealand middle school proponents. Chapter 3 studies the research literature surrounding the concept of a particular age-group called emerging adolescence. The various assertions of middle school proponents that emerging adolescence is a specific stage in human development is analysed in turn from biological, psychological, and sociological

perspectives. Chapter 4 reviews a sample of the national and international educational research investigating age-appropriate school structures. Within the international context emphasis is given to three particular case studies, that of Australia, England and the United States of America.

Chapter 5 synthesises the pedagogical research covered in these previous chapters, and outlines the case for a uniquely New Zealand middle school. An analysis of three New Zealand middle schools in particular informs the conclusions drawn concerning a New Zealand middle school structure. These schools are geographically spread the length of New Zealand and depict three distinctly different styles of middle schools. They include: Clover Park Middle School, a four-year Auckland institution, Berkley Normal Middle School, a three-year Hamilton school and Tweedsmuir Junior High, a four-year Invercargill campus. However, this discussion is also informed by the comments of two intermediate principals opposed to the developments of middle schools. One principal, of Bruce McLaren Intermediate was opposed for political reasons, the other of Northcross Intermediate for pedagogical reasons.

Furthermore, Chapters 6 and 7 outline the tensions that exist between that of national educational politics and the local politics of education. Chapter 6 examines the political pressures that interacted with the pedagogical concerns during the 1990s on the development of middle schools. Chapter 7 develops the case study of Rotorua city, as one example of the tensions and balances that existed between pedagogy and politics. Finally, Chapter 8 draws a number of conclusions and implications established by this research.

The concept of an age-appropriate school structure catering for the unique needs of the emerging adolescent, this thesis argues, has been an element of the New Zealand educational environment since the beginnings of a national educational system in 1877. Chapter 1 therefore, provides a brief outline of the historical antecedents that would lead subsequently to the development of middle schools in the 1990s.

## **Chapter One**

### **A History of Middle School Development in New Zealand: 1877-1988**

#### **INTRODUCTION**

In undertaking an historical analysis of the development of middle schools within the New Zealand context researchers must first be aware that the various historical examples found for the education of 10-to 14-year-olds have their own antecedents. These may not have been seen by the key figures in education at a particular time in quite the same context as applies nowadays. With the gift of hindsight, however, it is possible to suggest links with and similarities to current middle school philosophies and structures that have only become evident with the passing of time.

Within such an historical investigation exploring the concept of providing educational opportunities for 10-to 14-year-olds — in a school that was neither solely primary nor secondary — is central to this study. The focus of this chapter is to first investigate the various schooling provisions available for these students since 1880, and then to examine the extent to which each example can provide a useful historical perspective on the current development of middle schools in New Zealand. This does not ignore the fact, however, that many commentators have suggested different age-spans for middle schooling. The variety of these differing age and grade spans will be analyzed in Chapter 4. While this may seem to provide a rather imprecise definition of the topic, it does allow for the exploration of a variety of linked concepts that have played a key role in the development of middle school structures and a middle school

philosophy within the New Zealand context. The development of age-appropriate schools for 10-to 14-year-olds, it will be argued has a common heritage, whether they be in central schools, junior high schools, intermediate schools or, more recently, middle schools. Furthermore, regardless of the decade being examined, certain common themes or issues have been vigorously debated by educators, in relation to this particular age-group.

The concept of early specialization, wherein students of a younger age than post-primary school entrants were, (and are to be) exposed to specialist subjects, points to one such common theme. At various times in the New Zealand debate, this concept has been expounded as a reason for developing certain forms of middle schooling. An antithetical view has also been expressed, that of “exploration.” This term refers to the opportunity that middle schools offer for students to experience a wide range of educational opportunities before being required to specialize in a post-primary environment, (Beeby, 1938; NZIMSA, 1995; Watson, 1964).

A part of this debate relates to the development of a middle school as either a terminal institution — that is one from which the pupils then enter the workforce — or as a preparatory institution to a secondary or high school. A question thus arises: Should middle schools meet only the perceived and/or actual needs of those students who are not yet deemed suitable to embark upon for post-primary education, or should they provide a common educational experience *for all students* before they enter a post-primary institution?

One of the most commonly occurring debates in this historical overview is that of “educational efficiency.”<sup>1</sup> This term refers to the costs associated with the implementation of structural change. For example such issues as; the reorganisation of other school structures to accommodate the new structure, the provision for changed teacher status, and the need to provide purpose-built specialist rooms need to be considered. Debate over “efficiency” has occupied centre stage in discussions about the merits or otherwise of middle schooling. As explained in the present chapter, the development of new school structures throughout the last century has been examined with particular reference to the enhanced educational efficiency they provided or did not provide.

Historically, New Zealand’s educational commitment to the provision of institutions specifically to educate 10-to 14-year-olds, it will be argued, can be interpreted as a key concept in the pedagogical readiness of some New Zealand educators to push for the creation of separate middle schools. The extent to which the subsequent development of these middle schools became problematic can also be attributed to this historical legacy.

## USE OF HISTORICAL DATA

The use of historical literature as a research methodology provides a systematic and “objective” means to locate, evaluate and synthesize evidence pertaining to the development of middle schools in New Zealand. From a review of the evidence and

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1. Educational efficiency often refers to institutional efficiency; i.e. the extent to which schools actually do what their advocates (teachers, principals, governors) say they do.

literature facts can be established and conclusions drawn from past events.<sup>2</sup> The historical research began with a literature review of recent commentators (Cumming and Cumming, 1978; Lee and Lee, 1996, 1998, 2000; Nolan & Brown, 2001, 2002.) who provided introductions to and interpretations of the historical development of middle schools in New Zealand. These documents in turn referred to earlier commentaries (Beeby, 1938; Butchers, 1932; Campbell, 1941; and Watson, 1964) written closer to the period under investigation in this research. Together, the two generations of interpretative history provided a rich source of primary data that were then explored in some depth.<sup>3</sup>

Within an historical study such as this there exist three levels of historical data. The first is that provided by primary sources, such as the reports of ministers of education published in the Appendices to the Journals of the House of Representatives (AJHR). For the purposes of this research primary source material is considered to be that which was produced immediately an event occurred by those who were key participants in the event.<sup>4</sup> Other primary data, in the form of letters written by the participants in the events under investigation, were obtained by the researcher. They have been used in the discussion in chapter 2 which examines the development of middle schools during the 1990s. Some other primary data was gathered by way of

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2. "Facts" and "conclusions" will be subjected to scrutiny, as part of 'testing' validity.

3. This historical study proved to be especially rich in written data and artifacts with all source material readily available from national libraries and other archival repositories.

4. Primary sources are those which were written at a time contemporaneous with the period or person under study. They include letters, diaries, parliamentary debates (NZPD), AJHRs, newspapers, political pamphlets, and material located in archival repositories such as the Hocken Library (Dunedin).

interviews with key participants; this material is used to explore a variety of issues raised in the academic and other literature later in the study.

The second level of data relates to the material gathered by commentators who were describing and/or assessing contemporary events and developments. For example Clarence Beeby's investigation of 16 intermediate schools in the mid to late 1930s and John Watson's sample of 90 schools (45 large full primaries, 30 intermediate schools, and 15 intermediate departments attached to secondary schools) in the late 1950s provided primary material and interpretative data relevant to the era in which they were writing.

The third level of historical material refers to the largely interpretative work of academic educational historians who have attempted to locate more recent inquiries and understandings in an appropriate historical context. The nature of this current piece of research will be to add to this third level of educational historical interpretation. Such a review of historical literature therefore, attempts to "reconstruct what was done in the past in a particular respect,"<sup>5</sup> so that the past "helps us understand how our present educational system has come about; and can in turn help to establish a sound basis for further progress."<sup>6</sup> Gathering this historical data has also been a valuable preliminary exercise — acquainting the researcher with previous research in the area and providing valuable background information — prior to

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5. Cohen, L., & Manion, L. (1994). *Research methods in education*. London: Routledge, p. 45.

6. Cohen & Manion (1994), p.46.

undertaking case studies and interviews of key participants in the debate over middle schools and middle schooling.

The use of historical data is, however, not without its problems. The first difficulty is the level of bias that may be inserted by a researcher, which may be evident from his or her interpretative statements and from their understanding of the source material itself. Of particular relevance to this study are two related issues. First there is the danger of “projecting current battles backwards onto historical backgrounds.”<sup>7</sup> With reference to the present study, this would mean ascribing to earlier commentators meanings and understandings that have been arrived at subsequently.

The second issue is the concept of “descriptions in a vacuum,”<sup>8</sup> whereby a thought, concept or institution may be given credence without undertaking a wider analysis of other factors and issues, societal and political, that may also have had a bearing on the issue under investigation. The emergence of three-year and four-year middle schools in New Zealand has occurred within particular educational, societal and political environments and must be interpreted accordingly. The purpose of this historical research has been to understand that:

History is like an old house at night...we have to go inside and listen to what they're saying. And to look at the books and the pictures on the wall. And smell the smells.<sup>9</sup>

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7. Cohen & Manion (1994), p.55.

8. Cohen & Manion (1994), p.55.

9. Roy, A. (1997). *The god of small things*. New York: Flamingo, p. 52.

## THE 1877 EDUCATION ACT AND ITS LEGACY

Issues surrounding the provision and extension of educational opportunities to students from 10-to-14 years have been debated since the very beginnings of a national education system in New Zealand. The Education Act of 1877 established a nationwide primary education system in direct response to a long-running provincial debate which resulted in a wide variety of provincial educational systems converging into one entity. As some commentators have remarked (Cumming and Cumming, 1978; and Watson, 1964) the 1877 Act gathered the different provincial schooling systems into one education system for the colony, but did not necessarily establish a great blueprint for education generally.

During the debates in the House of Representatives of 1877 the place of secondary education was also hotly debated. The outcome was that provision was made for secondary schools in a separate act, the Education Reserves Act of 1877. These two acts created a two-tiered structure for New Zealand education. Consequently, reserving a place for another school structure, as represented by the term “middle school”, was not part of this early educational debate in the 1870s. This sharp division between the two acts<sup>10</sup> created different boards of management, different staffing entitlements and salary scales and eventually different teacher associations.

As Watson later observed:

This separation of the primary and secondary levels, as much an accident as an act of deliberate policy, undoubtedly handicapped

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10. Butchers, A.G. (1932). *The education system: A concise history of the New Zealand education system*. Auckland: National Printing Company, p. 75. Butcher comments that under the 1877 Education Act district high schools could be established and they were allowed to offer ‘higher’ subjects, those normally associated with high schools.

efforts at a later date to bring about greater harmony between them.<sup>11</sup>

Although this is a perceptive comment we can infer that the separation was more deliberate than accidental.

During the creation of a national education system two competing philosophies were evident. The first was that a compulsory, free and secular primary education ought to be provided for all young citizens. This was already occurring at a provincial level in Nelson and Canterbury and the Education Act merely built on this development nationally. The second philosophical thrust was that articulated by parties keen to set up a secondary education system. Questions were raised about what was to be provided in these institutions, once students had passed the compulsory years of attendance. This was a debate that quickly intensified in subsequent years.

As early as the mid-1880s the poor articulation between primary and secondary schools became a feature of much debate. Under the 1877 legislation New Zealand had created two separate and clearly differentiated institutions. The first, primary schooling was defined by a prescribed curriculum and made little mention of advanced study for 7-to-13 year old children who had to attend compulsorily. How, then, were primary students to come to an understanding of what they could learn and achieve by attending a secondary school? Few pupils remained at school past Standard VI. Of the few who did stay, many chose to remain at primary school for

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11. Watson, J.E. (1964). *Intermediate schooling in New Zealand*. Wellington: NZCER, p.3.

Standard VII rather than begin at a secondary school, due to the free nature of primary schooling.

In 1880 the O'Rorke Commission,<sup>12</sup> set up to report on the operations of the University of New Zealand and its relations with the secondary schools of the colony, recommended:

That a primary school, not being in the neighbourhood of a secondary school, when it contains, say fifty pupils above the fourth standard, be constituted a “Middle School”; and that a grant of £100 be made by Government towards the payment of an additional teacher or teachers, so that secondary instruction may be imported in such schools without detriment to its proper primary-school work.<sup>13</sup>

It seems that this Commission saw “middle schools” as being post-Standard IV institutions, but set up within a primary school in such a way so as to not to compete with but complement the work of secondary schools. The provision of a middle school suitable for smaller areas of population in New Zealand may have been an early attempt to enhance educational efficiency, because of the comparative remoteness from existing secondary schools. Also it may have been based on the assumption that some secondary level specialization would be of benefit to younger students. However, this middle school was not intended to be a stand-alone institution.

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12. Appendices to the Journals of the House of Representatives [AJHR]. (1880). The report of the Royal Commission inquiry into and report upon the operations of the University of New Zealand and its relations to secondary schools of the colony. H-1.

13. AJHR, H-1, 1880, p. 46.

Using this structure, students at the primary school — especially those in the senior standards who required enrichment or acceleration in their programme of work — could have the opportunity to study secondary subjects. Primary schools were permitted by these regulations to provide instruction in subjects not usually included in the standards.<sup>14</sup> This first reference to a middle school, as with every reference mentioned in this research, is governed by the context in which it was located. Commentators in each generation have developed a particular definition for middle schools, or middle schooling, and it is important to view these definitions in their historical context. As Cumming and Cumming commented, under the O'Rourke model “Standards Five and Six would still provide primary education but they would also introduce the able children to secondary studies.”<sup>15</sup> These students would remain at primary school but have the opportunity to experience secondary school work. It was this philosophy that tended to underpin the development of middle school thinking in New Zealand until the late 1920s.

Watson has remarked that in 1885 the Prime Minister and Minister of Education, Sir Robert Stout, was concerned about the disjunction between elementary and higher education. The latter proclaimed that “the absence of a ‘proper gradation between primary and secondary schools’ was one of the most serious weaknesses of the colony’s education system.”<sup>16</sup> According to Watson “Stout agreed with those who maintained that a study of the classics had to be begun early, but he does not seem to

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14. AJHR, H-1, 1880, p.5

15. Cumming, I., & Cumming, A. (1978). *History of state education in New Zealand: 1840- 1975*. Wellington: Pitman, p.114.

16. Watson (1964), p. 6.

have [had] any specific proposals for improving the articulation between the primary and secondary levels.”<sup>17</sup> Similar criticisms about the lack of articulation were often repeated by educationists (e.g., Mulgan 1915; Tate, 1925) in subsequent decades.

Within the context of this investigation, it is important to note that from the creation of the first national education system parliamentarians had begun to express concern about the rigid separation between primary and secondary education. Moreover, the suggestion that some form of middle school was warranted did not lie dormant, even if it was invoked initially simply to address the needs of smaller communities.

The government’s efforts, between 1877 and 1885, centred on the need to provide universal primary education and access to secondary education wasn’t considered a crucial issue, politically, until the late 1890s.<sup>18</sup> There was greater public pressure for ‘higher education’ to be accessible to more children and politicians responded accordingly, with a free place scheme in the district high schools in 1901 then — in a carefully calculated move — with secondary schools in late 1902. In 1901 the school leaving age (under the School Attendance Act of 1901) was raised to 14 years, and this prompted a call to widen access to secondary education. By the early 1900s the liberal government’s free place system had opened up opportunities for a wider cross section of society to attend secondary school. But it should be noted that for some time wider access did not equate to revised curricular offerings.

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17. Watson (1964), pp. 6-7.

18. McLaren, I.A. (1970, November). Education and politics: Part 1: Secondary education for the privileged. *New Zealand Journal of Educational Studies*, 5 (2), pp. 94-114.

## THE NELSON CENTRAL SCHOOL

It can be argued that the middle school philosophy achieved a major boost when the Nelson Central School for Boys opened on 14 August 1894. This institution was one of the earliest middle schools to be established in the western world.<sup>19</sup> The 1890s in New Zealand was a decade of world-leading social reform, attributable in some measure to the political leadership of such men as W. P. Reeves and R. J. Seddon. The Nelson school provided for 300 boys between Standard III and VII, 11-to 15-year-olds.<sup>20</sup> It was soon complemented by a similar school at Toi Toi Valley for girls. It is not difficult to see the ways in which the intermediate schools of the 1950s resembled these schools. The two Nelson institutions functioned as middle schools, educating the students from a wide range of contributing primary schools until the students entered secondary school or left school altogether. Four city primary schools acted as contributing schools with students being promoted to the new central schools at the beginning of Standard III.<sup>21</sup> These two provided primary based education with access to early secondary specialization. They were also terminal institutions with many of their ‘graduates’ leaving to join the workforce.

The two Nelson schools flourished, until the introduction of national salary scales for primary teachers in 1911, when this middle school experiment succumbed to the single national system, that is, it had to conform to the regular primer one to standard

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19. Middle schools operated in the German education system from 1872. See R.F. Butts (1955), *A Cultural History of Western Education: Its Social and Intellectual Foundations*, New York: McGraw Hill (2<sup>nd</sup> edition), pp.360-361.

20. Watson (1964), pp. 7-8.

21. Watson (1964), p. 7.

six primary schooling model.<sup>22</sup> Because these schools were included as part of the primary school system they provide a strong historical antecedent to the development of the two-year intermediate school in 1932, rather than for the stand-alone three-or four-year junior high school as was beginning to develop in the United States of America. The later model was adopted in New Zealand from the early 1920s, albeit not without controversy.

#### PURDIE, MULGAN, AND PARR

The Nelson region was not alone in exploring the possibility of trying to make better provision for the needs of students of this age-group. At an education conference in 1904 Edmund C. Purdie, an Inspector for the Auckland Education Board, moved a motion “that where possible and in order to promote a more thorough organization of the pupils in each class and to render the teaching thereof more effective, all pupils in classes above Standard III be taught in the same school.”<sup>23</sup> Purdie’s intention was for these students to be grouped together in a separate institution.

This motion was withdrawn, however, to allow Purdie more time to develop his thinking. According to Watson, Purdie began to pursue an interest in the new school restructuring movement in England where reorganization had resulted in the consolidation of the “higher tops” of the primary schools into “central schools”.<sup>24</sup> To this end Ian Cumming and Alan Cumming have stated that in 1905 Purdie “submitted

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22. Watson (1964), p. 9.

23. Appendices to the Journals of the House of Representatives [AJHR]. (1904). Report of the Chief Inspector of Primary Schools to the Minister of Education. E-16. p. 22.

24. Watson (1964), p. 16.

to the [Auckland Education] Board a scheme for the better organization and teaching of the pupils in Standards Four, Five and Six in the large centres of population.”<sup>25</sup> It would appear for the first time special consideration was being given to school structures for middle school students in urban areas.

Purdie believed that these central schools would make teachers’ lives less burdensome because students of similar attainments would be grouped together.<sup>26</sup> For example, better provision for the teaching of science could be made and less time wasted with the travelling to manual training centres. Each child could be placed in a class and subject for whom he or she was best suited, and teachers would now be able to use their specific talents and subject interests. These arguments, it will be seen, resurface throughout the debate on middle schools; they were central to the philosophy underpinning the formation of intermediate schools in New Zealand.

By 1907 Purdie’s arguments had developed a new coherency and were presented to the education conference that year. The three key concepts he developed centred on the creation of better teacher-pupil relationships, modifying the curriculum to cater for the varying abilities of children in this age-group, and to use the teachers’ special interests and talents in science, drawing, physical education and craft work more effectively. While little came from these conferences directly by way of developing a national central school philosophy, Purdie’s influence was not insignificant.

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25. Cumming & Cumming (1978), p.222.

26. Cumming & Cumming (1978), p.222.

In 1906 Purdie was elected to the Auckland Education Board<sup>27</sup>, and C.J (James) Parr became its chairperson.<sup>28</sup> The influence of Purdie's thinking on the development of the first junior high school in New Zealand and the emergence of a middle school philosophy cannot be overestimated. Equally important, however, was the reality that he was more influenced by the developments of the central school movement of England and Scotland than by the junior high movement of the United States of America. His comments supported the central school philosophy which suggested that the primary school pedagogy remain in place in the upper standards. This thinking conflicted with that of the American junior high school movement, which gave its philosophical support to the concept of teaching secondary subjects to younger pupils. The resultant tension, between earlier specialization and providing opportunities for an exploratory programme characterizes much of the New Zealand middle school debate throughout the twentieth century.

Similarly, the reports of E.K. Mulgan in 1915, after his visit to Scotland, were strongly influenced from that side of the Atlantic. According to Cumming and Cumming, Edward Mulgan saw "two distinct types of post-primary education in Scotland: intermediate, which provided for three years spent on instruction in languages, mathematics and science; and secondary, which provided for five years spent on traditional instruction leading to a leaving certificate."<sup>29</sup>

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27. Cumming & Cumming (1978), p. 222.

28. James Parr was later to become Minister of Education (1920-1926).

29. Cumming & Cumming (1978), p.223.

The debate surrounding the type of education that should be provided within the period of compulsory schooling intensified in the first two decades of the twentieth century. Education officials began arguing in favour of introducing a tripartite schooling model, which they believed would readily accommodate the variety of students' practical and academic abilities along with their vocational aspirations. The first institutional arrangement — a central school — was intended for those students not planning on entering secondary school. It retained the primary curriculum but allowed for a more extensive programme of work. The second institution was a technical school, within which a vocationally-oriented curriculum was provided. The third type of institution was a secondary school for those students deemed more academically capable. Two commentators have suggested that "such a scheme promised greater educational efficiency since course overlap between the different post-primary institutions would be eliminated."<sup>30</sup> Institutional efficiency, based on discrete functions for different types of schools, was thus equated with educational efficiency.

With the passing of the School Attendance Act of 1901 the compulsory leaving age was raised to 14 years. By 1917 only 37 per cent of students went on to an academic secondary school,<sup>31</sup> although a greater proportion proceeded to other forms of post-primary schooling, notably in technical high schools. The establishment of the secondary school free place system under Hogben in 1903 (or 1901 in the case of

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30. Lee, H., & Lee, G. (1996). Caught between two schools: The New Zealand intermediate school experiment. *Waikato Journal of Education*, 2, pp. 146-147.

31. Shuker, R. (1987). *The one best system? A revisionist history of state schooling in New Zealand*. Palmerston North: The Dunmore Press, p. 54.

district high schools) had made places in secondary schools more readily available. However, between 1901 and the early 1920s most students still chose to leave primary school and would later take night classes in technical schools if required to do so by their employers. The creation of a new school specifically designed to cater for children who would not stay at school beyond the compulsory age of 14 was seen by some educational spokespersons as a means to encourage those students who were not secondary bound — and therefore allegedly less academic — to stay at school.

According to Lee and Lee (1996), in 1920 James Parr, as Minister of Education, was “attracted to the system of central schools which had developed in England.”<sup>32</sup> There, he noted that the great majority of primary school leavers proceeded directly to central schools and the others to existing technical high or traditional secondary schools. The perceived need for a more highly educated New Zealand citizenship, coupled with an expected post-war growth rate in the population, encouraged a new age of experimentation that was tempered only by the agricultural depression of 1921 and the lack of financial support to encourage widespread educational experimentation. Furthermore, a growth in the number of school-age children added to the pressure to create structures that could cope with larger student enrolments. The concept of enhanced educational efficiency was again invoked to accommodate the perceived need to meet the changing requirements of society:

By the early 1920’s, overcrowding at New Zealand schools had become so bad that parents were obliged to trek from school to

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32. Lee & Lee (1996), p. 146.

school with their children of five or six years, trying to find places for them.<sup>33</sup>

At the end of the 1920 Teachers' Grading Conference, Parr initiated a discussion concerning the need to reform the education system. In particular, he invited discussion about the possible termination of primary education at the age of 12 and the setting up of central schools for those boys and girls who would not proceed onto secondary school, so that they could continue their education past the primary years. These students would then move "into the central school, where the instruction would have a commercial or industrial or agricultural bias in the case of boys, or a commercial or domestic bias in the case of girls."<sup>34</sup> Parr was therefore suggesting a new educational structure, more aligned to the pragmatic needs of a skilled workforce and away from the academic programme being offered by existing secondary schools.

## SUPPORT FOR JUNIOR HIGH SCHOOLS

Given that the courses in the proposed central schools excluded an academic strand and were, initially at least, to continue to be terminal institutions for students who were not seeking a secondary education; the main purposes of these new schools, as suggested by Parr, was to increase students' exposure to new subject areas so that they could make a more effective contribution to society. By 1921 Parr confidently declared:

It is clear that the most effective method of increasing the period of secondary education is to lower the age at which it is entered

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33. Keith, H. (Ed). (1984). *New Zealand yesterdays: A look at our recent past*. Sydney: Readers Digest, p.221.

34. New Zealand Educational Institute. (1920, June 1). *National Education*. Wellington: Author p. 175.

upon.... If such pupils had begun upon a specially adapted secondary course at an earlier age it is most probable that they would have been able to leave school at the same age as at present with a much more efficient educational equipment.<sup>35</sup>

The influence of the junior high school model was increasingly apparent in Parr's statements from 1921. These focused on the provision of a secondary style education in a specialized three-year school. This development, in Parr's thinking, marked a gradual move away from the primary-based central school philosophy, one which would become quite marked after the Departmental Conference on Post-Primary Education held in March, 1922.

Of concern to Parr and some Departmental officials in the early 1920s — after the Great War and the influenza epidemic had ended — was the fact that too many students were forced to remain at school due to the raising of the leaving age to 14. In 1901 many students spent only one year at a secondary school before leaving to enter the workforce.<sup>36</sup> A more efficient system of education was now required to provide these students with a “sound education” prior to them leaving school. However, the debate had now moved on from the central school philosophy of Nelson, England and Scotland — of providing a primary based education with secondary specialization — to one of providing a secondary based education for younger students (at about 12-to-14 years old). This significant change in philosophy was strongly influenced by the

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35. Keith (1984), p. 224.

36. Keith (1984), p. 224, quoting Parr in 1921, “the one years instruction for which 25% of the pupils remain at secondary school can be of little value, as it means that only a beginning is made to the study of several new subjects.”

increased contact which some New Zealand educationists had had with the American education system during and following W.W.I.

Opposition, however, to this increased secondary education influence was expressed at the 1920 Teachers' Grading Conference by Theo Strong, the Chief Inspector of Primary Schools. He was concerned with the impact these changes might have on the schools within his area of responsibility. Strong believed in the status quo, and was not impressed with the Minister's comments on overseas experience.<sup>37</sup> His stance was significant in terms of the role he was to play later in the setting up of intermediate schools.

Nevertheless Parr's question remained: How best was this experimentation to be provided? Parr had spent a good deal of time with Purdie during his work with the Auckland Education Board, and the idea of a central school structure is evident in the Board's early reports. While New Zealand had had ties with America, educational ideas and practices were usually imported from the English (e.g., traditions associated with academically-oriented secondary schools) and Scottish (e.g., grammar and district high school of Otago during the late provincial era, c. 1869) systems, since most New Zealand's settlers were from these countries.

#### MILNER AND WELLS – AMERICAN JUNIOR HIGH SCHOOLS

With the end of World War One, however, the influence of America on all aspects of our national development increased. Parr supported the visits of two leading New

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37. Lee & Lee (1996), p. 147.

Zealand educationists, T.U. (Thomas) Wells and Frank Milner, to the United States of America in 1921, in an attempt to gain a wider perspective on the worldwide educational reform movement. Wells had been principal of Richmond Road Primary School in Auckland and was the Director of the Auckland Teacher's College. Milner was then rector of Waitaki Boys' High School in Oamaru.

Presented to Parliament in 1921, Milner's report outlined the development of the junior high school movement in America. Milner had attended the Pan-Pacific Educational Conference held in Honolulu in August 1921, and at the request of Parr had travelled on to California after the conference to investigate and report on the junior high and central school movements in this state<sup>38</sup>. He discovered that in 1910, three pioneer junior high schools had been set up after a report by Dr. Frank Bunker, (Superintendent of Californian schools), in which a model of "6 + 3 + 3" education — with six years in the primary school, three each in the junior and senior high schools — was advanced.<sup>39</sup>

Milner's report to the New Zealand House of Representatives concluded with a series of nine recommendations. Number eight stated:

That Junior high schools (if not already authorized) be promptly established in the four chief centers, equipped for the prosecution of the following courses: (a) Professional; (b) commercial; (c) agricultural; (d) industrial or mechanical; (e) domestic science.<sup>40</sup>

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38. Milner, I. (1983). *Milner of Waitaki: Portrait of the man*. Dunedin: John McIndoe, p. 69.

39. Appendices to the Journals of the House of Representatives [AJHR], E-11, (1921), p. 7 Report on Junior High School movement in the United States of America, October 16, 1921. Report by Mr. F. Milner (M.A.)

40. AJHR, E-11, 1921, p.2.

It is noteworthy, in the light of future developments involving Milner that his recommendations did not go so far as to suggest that these schools be stand alone. The recommendation that a professional (to use the American terminology) or academic course of study should also be available contradicted Parr's original intentions for these schools. He had wanted the junior high schools to be more vocational and terminal thereby allowing the secondary schools to cater for the academically minded students. It was perhaps not surprising that Milner was invited by the minister to undertake this project. Parr's son attended Milner's school at Waitaki<sup>41</sup>, and the two emissaries carefully selected by Parr represented both primary and secondary schooling interests.

The second representative chosen by Parr was Thomas Wells, from Auckland, whose report was published a year later in 1922. This report discussed Wells' attendance at the Imperial Conference of Teachers at Toronto and explored the junior high school model more fully than had Milner. Wells was also supportive of its introduction into New Zealand. In fact, many of the ideas expressed in that document can be found replicated in the work of Dr. Beeby, carried out in the mid-1930s. Both Milner's and Wells' reports were clearly supportive of introducing junior high schools into New Zealand. They can be seen as a rare congruence of opinions from the traditionally separate New Zealand primary and secondary schooling sectors.

The discussion topic raised by Parr concerning the termination of primary education at the age of 12 years, at the Teachers' Grading conference in 1920, was resolved at

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41. Milner (1983), p.165.

the 1922 Conference on Post-Primary Education. The discussions held at this second conference can be seen in the light of the two reports received from Milner and Wells. This conference consisted of the Minister, four departmental officers (including Theo Strong), four post-primary principals, of whom Frank Milner was one and a primary school headmaster, Thomas Wells.<sup>42</sup> As Ian Milner (son of Frank Milner) later wrote “The conference *inter alia* resolved ‘that where a junior high school is established it shall not form part of a secondary or technical school.’”<sup>43</sup> Furthermore, the conference resolved that “junior high schools, where they are established, should be separate educational units.”<sup>44</sup>

Consequently, the model seen in American schools was to be introduced into New Zealand even if in a somewhat modified form.<sup>45</sup> The four key functions of the three-year junior high schools were to include an accelerated programme for “academic” pupils; to provide a terminal education for the non-academic pupil population; to offer centralized facilities and teaching, e.g., art, manual and technical instruction; and to promote educational efficiency and enforce social control. Many of these were ideas that had been espoused by Purdie as early as 1904.

Furthermore, these junior high schools provided an age-appropriate school structure where, according to Frank Milner:

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42. Education Department of New Zealand. (1922). *Special reports on educational subjects: Conference on post-primary education*. Wellington: Government Printer, p. 3.

43. Milner (1983), p. 166.

44. Education Department of New Zealand, (1922), p. 5. (clauses 2 and 3)

45. Watson (1964), p. 38. Watson comments however that there appeared to be little agreement among educators and that “all seemed prepared for various types to be tried out in different circumstances.”

The prepubescent period (six years to twelve) is that of childhood, susceptible to drill, formal discipline, and the fixation of habits... It is at the termination of this stage that the period of adolescence or youth supervenes.... Fundamental differences in physical and mental constitution are observable at the average age of twelve years at which the pupil enters Standard V in New Zealand.... The dawn of social consciousness in him [or her] brings with it a new host of interests and a new stage of emotional life.<sup>46</sup>

This, then, became the second “middle school” model to be developed in New Zealand. The first — the Nelson Central school — had operated some way along the lines of the English central school model of bringing the “top standard” classes from the primary service together in one place for several years duration. From this school the pupils either left school or went onto a technical college or secondary school if they could buy or win a place through scholarship. This experiment had ended in New Zealand, in 1911.

In 1922, it was suggested that an American model of independent junior high schools be adopted in New Zealand where pupils could study secondary subjects at an earlier age and have the opportunity to prepare themselves for the work that they would eventually undertake. Early specialization and exploration were to sit together but with little understanding of the tension that could exist between these two concepts. Four of the members of the 1922 Conference held an opposite view,<sup>47</sup> however, whereby the junior high school should be considered as part of a six-year technical or secondary school. One school would therefore be a feeder school for the other and be

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46. AJHR, E-11, 1921, p. 3.

47. Milner (1983), p. 166.

on the same physical site. Milner, John Caughley (then Director of Education), and Parr, were part of this minority group.<sup>48</sup>

The cost effectiveness of attaching a junior high school to an existing secondary school alone would have made this an attractive alternative in some quarters. Perhaps not surprisingly, the idea of attaching junior high schools to a secondary school, or locating them on the same site, was regularly voiced throughout and beyond the 1920s.

### THE NEW ZEALAND JUNIOR HIGH SCHOOL

Within the context of the middle school movement in New Zealand the establishment of the first junior high school in Auckland appears to have been a landmark, albeit controversial, decision. Its creation signalled the translation of the Nelson Central School experiment into a national movement. The influence of Parr, and the reforming zeal evident in the early 1920s due to post-war optimism, played a crucial role in this development. That the junior high reflected a different philosophical approach to the provision of secondary level education to younger students than that adopted by the central schools with their primary curriculum and teaching methods, was largely due to Parr's involvement in the creation of these institutions.

The notice to establish junior high schools, was gazetted on 4 September 1922, wherein it stated that, “a “junior high school” means a school established to provide a

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48. Milner (1983), p. 166.

three-year course of instruction for pupils.”<sup>49</sup> Students had to gain a certificate of competency at the end of Standard IV before being able to apply for enrolment. The classes were to be named seventh, eight and ninth grades reflecting American terminology and indicating further differences between the primary and secondary structures. Each of these new schools was to be run by their own school committee. However, clause three of these regulations left the New Zealand public in no doubt that the junior high schools were an educational experiment “The number of junior high schools to be established during the years 1922 and 1923 shall not exceed four.”<sup>50</sup> One was to be erected in one of the four main cities, one in a town of about 10,000 residents, and one as part of a district high school.

The first junior high school to follow these specifications, opened in Kingsland, Auckland, in October 1922. Kowhai Junior High School catered for students in seventh, eighth and ninth grades and was able under 1932-33 changes in regulations to continue with Year 9 students until 1957. Two of the reasons for Kowhai being established were that the Auckland Education Board had long been supportive of the middle school concept and there was serious over-crowding in the primary schools of the Kingsland area.<sup>51</sup>

Students who attended Kowhai were sorted and placed in classes according to the recommendation of the headmaster of the contributing primary school, their

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49. *New Zealand Gazette*, (1922). Regulations under the education act - Junior High Schools, (3), p. 2389.

50. *New Zealand Gazette* (1922), p. 2389.

51. Watson (1964), p. 41.

attainments on a number of psychometric attainment tests and an intelligence test that were fashionable selection instruments in the 1920s. According to Shuker (1987), first year students were placed into one of two broad streams, an upper academic and practical subject course and a lower one for those not moving on past the junior high level. In the second year the students in the first, more academic course were resettled and given academic work in preparation for entering secondary school the following year. Those students who were not continuing their schooling concentrated on manual and technical subjects. As Cumming and Cumming noted the first principal of Kowhai, R.E. Rudman, believed “the great success of this scheme will be judged by the results of the lower two-thirds of the pupils not the upper one-third who would in any case be successful in Grammar School.”<sup>52</sup>

As Shuker commented, in the lower stream “emphasis was placed on the acquisition of practical skills [by junior high school pupils] in preparation for their future roles as manual workers and homemakers.”<sup>53</sup> Hence the most senior classes were available to a few non-academic pupils who had no intention of continuing their formal schooling.<sup>54</sup> As a result of this many aspects of this first junior high school were considered to be experimental. The first junior high school proved to be an experimental testing ground for more than just the middle school philosophy and much of its work included the use of intelligence tests and the careful placement of pupils in classes designed to promote optimal learning opportunities.

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52. Cumming & Cumming (1978), p. 224, quoting a comment made by Rudman to Purdie in 1923.

53. Shuker (1987), pp. 176-177.

54. Beeby, C.E. (1938). *The intermediate schools of New Zealand*. Wellington: New Zealand Council for Educational Research, p. 22.

The Minister of Education's annual report of 1925 (summarizing the 1924 year) stated that four junior high schools had been established, although only one was a stand-alone school, the others being junior high school departments.<sup>55</sup> In an earlier report Parr had commented that Kowhai's curriculum had "a more vocational or practical bent than that of the secondary school... to give a more complete training for industry and commerce."<sup>56</sup>

Frank Milner had also established a junior high as a department of Waitaki Boys' High School in 1925 in line with his own minority vote at the Education Department's Conference of 1922. Milner was rebuked in Oamaru for doing this, because he was seen to be supporting something that went against the majority vote of the 1922 Conference. However, Ian Milner claimed that his father had the support of the Minister of Education, Parr, and that his minority vote at the conference revealed Frank Milner's opposition to creating a stand-alone junior high school.<sup>57</sup>

The Minister, in this 1925 report, appeared satisfied with the initial success of the junior high school system. He informed his colleagues that four junior highs had been established at Kowhai, Waitaki, Matamata, and Northcote, according to the trial mentioned in the 1922 Regulations. However, Parr reiterated an important caveat that he had referred to on a number of occasions, including his opening speeches for

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55. Appendices to the Journals of the House of Representatives [AJHR]. E-11, (1925), p. 3. Report of the Minister of Education year ending 31 December 1924.

56. AJHR, E-1, 1923, p.3. Report of the Minister of Education for the year ended December 31 1922.

57. Milner (1983), p. 165.

various junior high schools. New Zealand, he maintained, must devise its own school system that would meet the perceived needs of pupils. Parr confidently, and perhaps optimistically, wrote:

There is no need for experiment regarding the value of the junior high school principle itself. That stage has passed. The testimony of other countries as well as our own experience sufficiently establishes the validity of the principle. We are now trying out different methods of applying the principle to the varying sets of conditions to be found in the different districts of New Zealand, and the results already obtained are distinctly encouraging.<sup>58</sup>

Support for the junior high school movement also came from Mr. Frank Tate, Director of Education in Victoria, Australia. In 1925 he was invited by Parr to review the New Zealand post-primary education system. Tate had conducted an earlier review in 1903.

According to Butchers (1932), although Tate noticed certain defects in the education system — for example the “the general lack of articulation between the primary and post-primary schools [as a result of] the belated adoption of the principle of intermediate school,”<sup>59</sup> — he was generally supportive of the junior high system. The merits of the junior high schools, he claimed, were that they were ideally positioned “to give pupils a broad outlook upon the world’s work and help them ascertain their own aptitudes, interests and abilities with reference thereto.”<sup>60</sup>

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58. AJHR, E-1, 1925. p.3.

59. Butchers (1932), p.220.

60. F. Tate (1925) cited in Lee & Lee (1996), p.150.

By 1925, then, it would have appeared to some contemporary commentators that a national middle school system had in fact been created out of the philosophies of the English and Scottish central school movement, our own Nelson experiment, and the junior high movement of the USA. Legislation had been passed for stand-alone junior high schools to be formed under the authority of their own school committees. Pedagogy had been developed which, for the first time, revealed a good deal of agreement from both the primary and secondary education sectors. The junior high schools were to provide terminal education particularly in the manual subjects for those students 11-to 14-years-old who had left primary school but had little intention of pursuing an academic career. Unlike the anticipated outcomes of the 1922 Education Department Conference, however, after the establishment of Kowhai, junior high schools had not developed as stand-alone institutions but had taken another form. As Watson observed:

Expediency rather than experimentation was the decisive factor, and in its first decade the history of junior high schools consisted of little more than a record of Form 1 and 11 classes being attached to secondary schools in small towns.<sup>61</sup>

Gone were the references to grades seven, eight and nine that had been placed so carefully in the regulations establishing junior high schools. However, in the minister's report of 1927, mention was made of the creation of a specially constituted committee to rewrite the current primary syllabus of instruction:

In such a way as to provide a primary course suitable for pupils up to about the age of twelve years, and a post-primary course of two

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61. Watson (1964), p. 42.

or three years in an intermediate school, followed by a further period of a senior high school.<sup>62</sup>

This syllabus revision was undertaken by the Syllabus Revision Committee between 1926 and 1928, chaired by Professor Richard Lawson of the University of Otago Education Department. Of particular interest was the Committee's desire to use the primary syllabus to develop a programme for junior high schools, although all but one of the junior high schools (Kowhai) was attached to secondary schools. Of further note is the use of the term "intermediate" four years prior to the establishment of officially sanctioned "intermediate schools."

#### THE HADOW AND LAWSON REPORTS

The first official criticism of the junior high system arose with the appointment of a new Minister of Education in 1926, Mr. Robert Wright. This change in minister culminated in a reassessment of the policy and direction for the junior high schools. Disregarding the work of Tate, Wright stated in 1926; "The proposed reorganization [the creation of junior high schools] has been received with a certain amount of caution, if not reserve, mainly because of the uncertainty of its effects upon both primary and secondary schools and the lack of sufficiently definite information regarding the cost..."<sup>63</sup> Gone from the Minister's report were the favourable comments that characterised Parr. In its place, concern began to be expressed about the heavy cost that the new system was imposing on the country.

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62. Appendices to the Journals of the House of Representatives [AJHR].E-1, (1927), p. 3. Report of the Minister of Education year ending 31 December 1926.

63. Campbell, A.E. (1941). *Educating New Zealand*. Wellington: Department of Internal Affairs, p. 140.

At the same time as the junior high schools were being promoted in New Zealand another equally strong movement had developed within the English education system. In 1926 the Hadow Report was released with a recommendation that all primary education terminate at eleven years and that all these students then attend a post-primary school providing a common core of instruction regardless of their abilities and future vocational intentions. This report, *The Education of the Adolescent*, was to influence many of the developments of junior high schools post 1926. The later development of intermediate schools in New Zealand was influenced to some degree by the philosophies expressed in the Hadow Report.<sup>64</sup>

Several ideas from the Hadow report were reiterated in a New Zealand context in the *Report of the Syllabus Revision Committee* (Lawson Report) of 1928. The Lawson Report, quoting the Hadow report, stated:

There is a tide which begins to rise in the veins of youth at the age of 11 or 12. It is called by the name of "adolescence." If that tide can be taken at the flood and a new voyage begun on the strength and along the flow of its current, we think it will move onto fortune. We therefore propose that all children should be transferred at the age of 11 or 12 from their primary school. Transferred to new ground and set in a new environment, which should be adjusted as far as possible to the interests and abilities of each range and variety, we believe that they will thrive to a new height and attain a sturdier fibre."<sup>65</sup>

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64. Beeby (1938), pp. 38-40.

65. Lawson, R. (1928). *Report of the syllabus revision committee set up by the Minister of Education: Hon. R.A. Wright, 1926-1928*. Wellington: Government Printer, p. 18.

Echoing the comments Parr had made in 1921 on the characteristics of adolescents, the Lawson Report began to give political credence to the recently developed psychological theories about the development of adolescence.

The Lawson report is famous in New Zealand's educational history for its well articulated majority and minority reports. The majority report closely followed the Hadow recommendation that all children should leave primary school and attend a post-primary school, each offering a common core of instruction. The minority report, however, recommended that students should remain at primary school and pursue a greatly enriched programme of work. Within this minority report emphasis was placed on the financial savings that would be made if students remained at primary school.<sup>66</sup> Those who signed the minority report were firmly opposed to junior high schools in the belief that such schools "tend to destroy articulation rather than otherwise." Not surprisingly, therefore, they recommended against any further development of the junior high concept.

Within five years of being established, the junior high school movement was being questioned from an educational efficiency perspective. The key determinants in this change in educational thinking were that some educators claimed students should not have to face two changes of school at this time in their life. These commentators suggested that a common education for all was more desirable than the dominant policy and practice of gearing education instruction to suit student's future

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66. "Eight junior high school experiments that have been introduced in New Zealand, providing for 2300 pupils... has cost about £50,000 more in capital expenditure than the old system" (Lawson (1928), p. 48.).

employment. A tension between early specialization or exploration programmes arose again in this debate. Parr's support for early specialization, and exposure to secondary subjects was undermined by the rapidly increasing length of time students were attending school.

### THE BODKIN COMMITTEE

The junior high movement still had strong advocates, however. The 1930 Recess Education Committee Report,<sup>67</sup> commonly known as the Atmore or Bodkin Report, supported the continuation of this type of education. The purpose of the junior high schools, it suggested, should no longer be to provide early specialized secondary courses. Instead the Bodkin Committee wanted the junior high schools to offer "exploratory courses in which the "special aptitudes" of the students may be discovered and developed."<sup>68</sup> Unlike Parr's earlier vision of early specialization and exploratory programmes co-existing comfortably, the 1930 report articulated a preference for solely exploratory programmes.

Criticism of any suggestion or policy that all primary students should attend secondary schools was made with reference to how junior classes in secondary schools were structured and the poor pupil retention rate. Fault was found by the Bodkin Committee on behalf of the 50 percent of students who attended secondary school where they were hurried all day from room to room, and teacher to teacher. The committee argued that children were taught by a range of peripatetic teachers, in

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67. Appendices to the Journals of the House of Representatives [AJHR]. 1-8 A, (1930). Report of the Recess Education Committee on educational reorganization in New Zealand, July 15, 1930.

68. AJHR, 1-8A, 1930, p. 152.

a plethora of strange subjects. They were set tasks for homework rather than continuing the successful primary model of set reading. The committee was concerned at the number of junior members of staff who taught these children in a secondary school.<sup>69</sup> Strong criticism was therefore levelled at an inappropriate secondary education pedagogy being delivered in junior secondary classrooms. It is of interest to note here the similarities of these criticisms of secondary pedagogy with those voiced by the supporters of “middle school” development in the 1990s.<sup>70</sup>

Given the controversy that had arisen over junior high schools, it was perhaps predictable that the Bodkin Report would include evidence from some secondary school principals that was “opposed to the establishment of separate schools of the Kowhai type,” recommending “that junior departments should be attached to the existing high and technical high schools instead.”<sup>71</sup> Opposition, therefore, seemed to be directed toward the idea of separate junior high schools rather than junior high schooling philosophies as such.

Equally important, however, in the submission made by Mr. C. W. Garrard, Senior Inspector of Auckland Schools, reference was made to the term ‘intermediate.’<sup>72</sup> This was one of the first occasions that such terminology had been used within the New Zealand education community. This reference built on that of Parr’s in 1927 when establishing the Syllabus Revision Committee and references to “intermediate

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69. AJHR, 1-8A, 1930, pp 14- 17.

70. Education Review Office. (2001). *Students in Years 7 and 8*. Wellington, NZ: Learning Media

71. AJHR, 1-8A, 1930, p. 21.

72.“That intermediate classes should form part of the education system, and that the types of schools and classes as suggested by Mr. Garrard be recommended to the government” AJHR, 1-8A, 1930, p. 24.

classes” in the Bodkin Report. By 1930 then, four terms for describing the education of 11-to 14-year-olds — middle, central, junior high and intermediate — had been referred to by New Zealand educators.

## THE ESTABLISHMENT OF INTERMEDIATE SCHOOLS

In summary, by the early 1930s three clearly articulated schools of thought existed in New Zealand concerning the education of these “middle years” students. First, was the work by Purdie, Mulgan and Parr in articulating an educational philosophy for separate institutions, which had born fruit in the setting up of the independent Kowhai Junior High School and nine junior high school departments. They saw the development of this new educational structure as both experimental and, more importantly, as something that was specifically New Zealand oriented. These schools were based on the American junior high school philosophy which allowed for the early introduction of secondary subjects (specialization) to those pupils who may not otherwise be able to experience them because they would leave school at the end of the period of compulsory education, while encouraging at the same time the development of exploratory courses of work.

This policy had been supported by Tate and the Bodkin Committee providing a new direction for these schools, whereby catering for pupils’ individual differences was emphasised. Such an emphasis was seldom evident in secondary schools if the Bodkin Committee observations were accurate. A lack of confidence in the academically-orientated secondary schooling system, and an acceptance of the value

of separate junior high school institutions had influenced the findings of the Bodkin Committee.

Second, there was a school of thought that upheld the recommendations of the Hadow Committee, that primary education should finish at eleven and that all students should make only one change to a post-primary institution. Each of the latter institutions, it was believed, should provide a similar series of courses to cater for the perceived needs of all students. By 1930, seven of the eight junior high schools were not stand-alone institutions. Some were attached to primary schools, but the majority were, like Waitaki Junior High School, attached to some form of secondary or district high school.<sup>73</sup> The advantage of attaching these junior high schools as departments was that it gave pupils access to secondary specialist staff and resources.

The only common ground between these two perspectives was agreement that primary education should terminate at eleven years and that it was desirable for all students to remain at school until they reached the legal leaving age. The main point of difference between these two perspectives lay in what was considered by the respective commentators to be the most appropriate curriculum to offer all students. Proponents of the third educational philosophy argued that students should experience primary education for a longer period of time than was presently available and that this programme of work should be more exploratory and less specialised in nature. Proponents of the central school movement, the recommendations of Tate in 1925 and the philosophy of the Director of Education, Theo Strong, echoed this

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73. AJHR, 1-8A, 1930, p. 14.

perspective. By 1931 one-third of all secondary school enrolments were in Form 3,<sup>74</sup> and with such significant growth in student numbers a decision needed to be made about which of the three school structures would become the one to be implemented nationally.

In 1931 Robert Masters was appointed Minister of Education, and on 15 December 1932, at the peak of the economic depression, regulations were passed which formally created intermediate schools in New Zealand.<sup>75</sup> The legislation specified the duration of instruction at two not three years, except in special cases. The latter provision was intended to encompass Kowhai Junior High School; an arrangement that lasted until 1957. The newly named intermediate schools were to be part of the primary service as had been a number of the junior high schools. The term “intermediate school” had been introduced to New Zealand by Wells, when in his report to the House of Representatives in 1992, he referred to “the junior high school or “intermediate school” as it is sometimes called,”<sup>76</sup> in the American vernacular. A prescribed, compulsory curriculum was outlined for intermediate teachers and pupils, including: English, history, civics, arithmetic, geography, elementary science, drawing, singing, and physical education. The schools were to be funded, however, on the less generous primary service staffing and salary scales.<sup>77</sup>

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74. Watson, (1964), p. 60.

75. New Zealand Gazette (1932, December 22) and (1933, June 22) and New Zealand House of Representatives. (1939, November 22) Order in Council ( serial no 1939/ 246).

76. Appendices to the Journals of the House of Representatives [AJHR] (1922). Report of T.U. Wells. E-11. p.15.

77. Lee & Lee (1996), p. 152.

Commentators were quick to respond to this reform. Sir James Parr, the previous Minister of Education who had established junior high schools, boldly declared that the “‘intermediate school plan’ was an unfortunate regression.”<sup>78</sup> J.F Wells, Principal of Kowhai Junior High School, stated his opinion:

backed up by experience, is that scholars not likely to continue for any length of time at secondary or technical school gain infinitely more by continuing at Kowhai than breaking their course to put in a brief period at a secondary or technical school where they will of necessity be mere nonentities.”<sup>79</sup>

#### JUNIOR HIGH SCHOOLS AND INTERMEDIATES COMPARED

While some commentators (Lee & Lee, 1996; Nolan & Brown 2002) reiterate Watson’s (1964) initial comments that the creation of intermediate schools was a sudden change in direction by the government<sup>80</sup>, in his history of the intermediate school movement Watson does not hold with the argument that this was, in fact, a sudden change in direction. Rather, he suggested, it was the speed with which the change was introduced that was surprising. The Forbes government, prior to their election in 1928, had nominated the development of the intermediate system as a vital part of their educational policy. One of the key proponents of intermediate schools, Theo Strong, Director of Education (1927-1933) stated in an article written in 1931,<sup>81</sup> that he was an advocate of the two-year intermediate system and spoke of these schools as if they were already in existence.<sup>82</sup> Strong believed that the development of intermediate schools would be a cheaper alternative to junior high schools because of the more favourable staffing and funding ratios they would provided by being part

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78. Cumming, & Cumming (1978), p. 251.

79. Wells, T. U. (1933, January 18) Letter to D. W. Dunlop: Secretary Auckland Education Board, cited in Cumming & Cumming (1978), p.252.

80. Watson (1964), p. 55.

81. *The Year Book of Education 1932*.

82. Cumming & Cumming (1978), p.252.

of the primary service. This was important for a government faced with an economic depression, an immediate need to rebuild the schools in Napier destroyed in the 1931 earthquake, and the building of new schools in Gisbourne and Wanganui. Educational efficiency had not ceased to be a political concern, particularly at a time of limited fiscal resources.

Strong also argued that if three-year junior highs continued to function then they would be viewed unfavourably by the public as terminal institutions. Intense debate over the duration of intermediate level schooling had occurred in the early-1930s, prompted by concern that students had to be accommodated longer at school owing to the economic depression. Employment opportunities for youth were minimal, and boys and girls had little choice but to stay on at school or leave school to help their families, domestically.<sup>83</sup> Due to such economic pressures Strong articulated a growing concern for the new concept of a bridging school. Earlier commentators, such as Frank Tate, during his review of the New Zealand education system in 1925 had suggested that one of the defects he noticed in the education system was “the general lack of articulation between primary and post-primary schools.”<sup>84</sup> The idea of adding the intermediate school to the compulsory part of the primary education system coupled with the official expectation that every student would undertake some form of secondary education also meant that the immediate economic needs of the country could be satisfied, according to this thinking. Furthermore, while junior high schools had individual school committees under the 1922 regulations, Strong and

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83. AJHR, E-1, 1931, pp. 1-20.

84. Butchers (1932), p. 220.

Masters maintained that intermediate schools could be served more cost effectively by the regional education boards. One of the primary aims of the Forbes administration was to cut public expenditure. As the Director of Education commented:

We have therefore to seek for the aims that during this time of financial depression urge us and urge the minister to countenance making this change wherever it is possible to do so with little or no increased expense to the country.<sup>85</sup>

Nevertheless, this policy change ought not to be seen solely in terms of saving expenditure. A variety of reasons for supporting this change had been articulated throughout the history and development of junior high schools in the 1920s. For example, in 1930 the Otago High Schools' Board of Governors was sufficiently concerned at the prospect of their schools losing their third form students to a junior high school — if three-year schools were retained — that they published and distributed a pamphlet urging the government to support the transfer of students to secondary schools at the conclusion of Form 2.<sup>86</sup> It is reasonable to suggest that such pressure from high schools, fearing declining enrolments in the depression years because of junior high schools, would have added considerable weight to the decision to have third formers attend secondary schools rather than continue with three-year junior high schools.<sup>87</sup> Echoing this sentiment, Nolan and Brown (2002) claimed that “successful political lobbying by school principals and by secondary and primary

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85. *New Zealand Education Gazette*, (1933, April 1). Verbatim report of the director to a meeting in Christchurch 23 February 1933. Wellington: Government Printer, p.48.

86. Lee & Lee (1996), p. 154.

87. It is important to note that Beeby, (1938), pp. 32-33, however does not support this conclusion stating that the Secondary Schools Association was as opposed to the change to two-year intermediates as were any other pressure group.

teachers' unions not to support them [three year junior high schools]"<sup>88</sup> was one of the significant reasons why two-year intermediate schools were established.

Watson, for his part, remarked that had the government adopted the three-year format it would have required a drastic reorientation of secondary education because one-third of all post-primary enrolments, by the early 1930s, were Form III students. The fiscal reality of the times had as much to do with the change, as the conference debates had had in determining the ground to be discussed. The reality was that by 1930 stand-alone junior high schools had not been established in any number.

Furthermore, the intermediate school philosophy of providing a responsive environment to accommodate and nurture individual needs had not been part of the orientation of the attached junior highs. Instead, the latter had been directed toward providing an early introduction to secondary subjects for a younger cadre of students. Under this model attachment to secondary schools, in particular, had secured access to a specialized teaching staff and resources, but that was no longer to be a major part of the intermediate school strategy. Department of Education officials understood that by 1930 the growth in the number of students remaining at school in the third form year, had already begun to put pressure on the supply of suitable post-primary teachers.

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88. Nolan, C.J.P., & Brown, M. (2002). The fight for middle school education in New Zealand. *Middle School Journal*, 33 (4), p. 36.

## A RATIONALE FOR INTERMEDIATE SCHOOLS

In 1933 the Director of Education reminded the public that the junior high schools in New Zealand had not been established to meet the same needs as those in the United States.<sup>89</sup> Strong outlined the purpose of the new intermediate school in the following terms:

- (1) [It will draw] a large number of senior pupils of about the same age and the same intellectual standard together and [enable] them to be classified into groups.
- (2) [It will have the] advantage of bridging the gap between the primary and secondary schools.
- (3) When the pupils are centralized it is quite possible to introduce a greater measure of specialization than is possible under existing conditions.<sup>90</sup>

Owing to this change in governmental policy, some commentators (Campbell, 1941; Lee & Lee, 1996) have suggested that intermediate schooling lacked a clear cut and consistent philosophy and therefore that there was a failure to be able to adapt the theory of junior high schools to the New Zealand situation. Furthermore, that the confusion that existed between the different goals of the American and English systems, evident in New Zealand, further clouded the development of a clear philosophy for this structure of schooling. Campbell went further when he asserted that the models developed in New Zealand were derived from overseas. As a result, New Zealand educational policymakers did not devise a model to suit any allegedly unique requirements:

In its early stages at least the New Zealand [intermediate school] movement was a reflection of these overseas developments rather than a response to widely felt and clearly-defined local needs. And

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89. Watson (1964), p. 34.

90. *New Zealand Education Gazette*, (1933, April 1), p. 51.

that was one of the main reasons for the intellectual confusion that has been its peculiar curse.<sup>91</sup>

This criticism is open to scrutiny, however. During the 1920s there had been some experimentation with a number of different structures as New Zealand educational administrators began to anticipate that students would soon remain at school for longer periods of time. Parr himself had, on many occasions, referred to the 1920s as being an age of “experimentation.” To a certain extent the move to intermediate schools in 1932 could be seen as a continuation of this same policy of experimentation. What had been achieved by the move to intermediate schools was the establishment of (and emphasis upon) an exploratory course of work, albeit within a two-year timeframe, rather than endorsing the early specialization that characterised the junior high school model. As Robert Masters, Minister of Education, stated in his 1933 report:

The aim of intermediate school is to remove pupils at the age of eleven or twelve from the environment of the primary school and place them in separate schools or in departments attached to post-primary schools where they will be given the opportunities of displaying their natural aptitudes, inclinations and interests, and of indicating whether they should continue their education at a secondary school...or a technical school.<sup>92</sup>

These educational experiments were being appraised by educationists and officials at frequent educational conferences, and the development of a uniquely New Zealand approach may have been foremost in the Department of Education officials thinking. As Watson commented, one of the most articulate supporters of the two-year

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91. Campbell (1941), p. 139.

92. AJHR,E-1, 1933 p.3.;see also Beeby, 1938, p.42.

structure was that of the Director of Education, Theo Strong.<sup>93</sup> Watson stated that while the government itself took little interest in the two-year or three-year debate, departmental officials were aware that the regional education boards had been less than enthusiastic with junior high schools and that these officials were aware of the need to consider building intermediate units in larger urban areas to replace manual training centres. The politics of these building decisions were, for department officials, enhanced by two-year intermediate schools.<sup>94</sup>

It is noteworthy that both the primary teachers' union, the New Zealand Educational Institute (NZEI) and the Secondary Schools Association (SSA), questioned the introduction of two-year intermediate schools. The NZEI executive were concerned that the change was being introduced at a time of cost cutting, that national finances needed to be improved and that the early stages of learning needed addressing as a matter of urgency.<sup>95</sup> The secondary teachers, for their part were concerned with intermediates "being introduced without a definite philosophy behind [them]."<sup>96</sup> The latter statement gives weight to the popular belief that intermediate schools were created without informed educational debate having occurred, but the reality was that they were deliberately created as one alternative from among many different competing philosophies. The early intermediate school tended to owe more to the central school philosophy of the late 1890s and early 1900s than to the American

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93. Watson (1964), p. 58

94. Watson (1964), pp.59-61.

95. Beeby (1938), pp. 34-35.

96. Campbell (1941), p. 144.

junior high model. However, it would be fair to comment that a sense of confusion and conflict marked the emergence of intermediate schools in New Zealand.

### THE BEEBY REPORT (1938)

What the 1932 Regulations for Intermediate Schools and Departments achieved for middle school development in New Zealand was the creation of an institutional structure that could deliver a form of middle school education. What was missing, though, was a strong consensus of opinion about what middle school education should be beyond the immediate economic needs of the early 1930s. As Beeby was to comment in 1938:

The cause for surprise is not that the schools should have lagged along the road but that they should have gone so far, since no-one has ever quite known where they were going.<sup>97</sup>

The task of giving some direction to the intermediate schools fell to Dr. Beeby Director of the New Zealand Council for Educational Research (NZCER) in 1936.<sup>98</sup> The NZCER had been set up with a grant from the Carnegie Corporation of New York, in 1933.<sup>99</sup> Clarence Beeby was appointed its first chief executive officer and then director in 1934.

In 1935 the first Labour Government was elected to office. In the same year Professor Fred Clarke visited New Zealand from the University of London Institute of

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97. Beeby (1938), p. 37.

98. Beeby (1938), p. 35.

99. Beeby, C.E. (1992). *The biography of an idea: Beeby on education*. Wellington: NZCER, p. 85.

Education. Ian and Alan Cumming have summarised Clarke's reservations about intermediates as follows:

[Clarke had a] dislike of the two-year intermediate course and said the term 'intermediate' was either a misnomer or it implied a wrong conception of what a school should be. No school, he said, should be regarded merely as a ladder between two other schools, but each should be autonomous, with its own particular function to perform—in this case that of making suitable educational provision for the years of early adolescence.<sup>100</sup>

New Zealand intermediate school teachers were required by the 1932 Regulations to cover the full course of instruction laid down for Standard 5 and 6, including preparation for the Standard 6 Proficiency Examination.<sup>101</sup> Furthermore, these teachers were expected to follow the philosophy of exploration so as to cater for the student's individual aptitudes, capacities and interests. They were also to provide, where possible, some early specialization in secondary subjects, at a time of limited resources and with unfavourable primary staffing ratios during and beyond the 1930s.

<sup>102</sup> An exceptional workload for any classroom teacher.

In 1936 the newly created NZCER accepted its first commission from the Labour Government. Noeline Alcorn (1992) described Beeby's involvement in this commissioned research in the following terms:

[The NZCER] had been urged by the NZEI to carry out a survey and analysis of intermediate schooling in New Zealand, judging that this would not compromise the independence they valued so highly. This was a project that Beeby was to undertake himself and it took him away from Wellington for two lengthy (five to seven

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100. Cumming, & Cumming (1978), p. 253.

101. This remained a requirement until 1937.

102. Campbell (1941), p.142.

week) trips through both islands, visiting schools, collecting data and interviewing staff, principals and parents.<sup>103</sup>

This investigation was supported by both the NZEI and the Technical School Teachers' Association (TSTA). The Secondary Schools' Association, it will be recalled, had already complained that intermediate education was "being introduced without a definite philosophy behind it."<sup>104</sup>

For Beeby the main challenge involved taking the term "intermediate" and making it relevant to the educational and political climate of late-1930s New Zealand. Beeby investigated 16 intermediate schools, 11 of which were attached to post-primary schools.<sup>105</sup> As Watson later remarked, many of Beeby's recommendations were unduly influenced by what he personally saw in these institutions. By inference, therefore, a difficulty arose when formulating a philosophy for an organization — which may involve some reorganisation — because there were very few institutions in the sample to support a comprehensive educational policy. To this end, much of the work that T.U. Wells had reported on in 1922, regarding the American junior high schools, found its way into Beeby's study. Consequently, Beeby was influenced by a primary principal's view about the best direction for the junior high movement rather than those of a secondary principal, such as Frank Milner. The legacy of such thinking was that it reinforced intermediate schools being firmly established as part of the *primary service*.

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103. McDonald, G., & Benton R. (Eds.) (1992). *The Beeby Fascicles: 4*, Wellington: Te Aro Press, pp.17-18.

104. Lee, & Lee (1996), p. 158.

105. Watson (1964), p.67.

Beeby's report, when published in 1938, outlined eight philosophical tenets of intermediate education. These tenets, articulated in his second recommendation, dealt with the broader functions of the intermediate school in New Zealand. According to Beeby the first tenet of intermediate schooling should be:

To provide a socially integrative period of schooling,... the chief function of the intermediate school [is] to provide between the two [primary and secondary] a period of expansive, realistic, and socially integrative education that will give all future citizens a common basis of experience and knowledge. No other function should interfere with this.<sup>106</sup>

Beeby sought to privilege the exploratory philosophy over that of early specialization. The former function was linked directly to his belief that intermediate schools ought to be available to all students, and should provide a wide-ranging exploratory experience rather than promote early specialization in secondary-level subjects.

His second tenet was "to introduce all children gradually and sympathetically to the world of industry, commerce and the professions."<sup>107</sup> Beeby stated that he wished to see every child make meaningful links with the adult world that he or she was to live in, and to experience the breadth of learning necessary for children to make better informed choices before embarking on secondary school courses of instruction. In Beeby's thinking then, it was important that each child be able to "[exercise] a

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106. Beeby (1938), p. 210.

107. Beeby (1938), p. 210.

rational choice of future school course and occupation based on the knowledge of his [or her] own aptitudes and interests.”<sup>108</sup>

Beeby understood that for some pupils intermediate education would be terminal. Accordingly, he recommended that one function of intermediate schooling should be “to give a rounded-off education to children not intending to take a reasonably complete post-primary course.”<sup>109</sup> Given that such a recommendation entailed the extension of the duration of intermediate schooling it allowed Beeby to comment on various arrangements for educating students in this institutional context. This can be seen in relation to the next tenet which stated that intermediates should “assist children who are not going on to post-primary school to secure suitable employment, and to provide education for them until such employment is found.”<sup>110</sup> Within the context of schooling in the 1930s, this gave a clear justification for the provision of a three or possibly a four year-middle school. If children were to remain at intermediate school until they had found employment, rather than to enter a secondary school, then definite provision for longer than two-year intermediate schools would have to be made.

Beeby followed this tenet with a later recommendation that developed this argument further. He believed in the need “to provide for children continuing schooling to a higher level ... mid-way between that of the primary school and that of the post-

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108. Beeby (1938), p. 211.

109. Beeby (1938), p. 211.

110. Beeby (1938), p. 211.

primary.”<sup>111</sup> Nevertheless Beeby also believed in the need “to continue teaching the fundamental tools of learning.”<sup>112</sup>

While many of his recommendations related to the physical conditions of the schools, others were seen by Beeby as part of a blueprint for the development of intermediate education. Particularly relevant to the discussion of three and four-year middle schools was Beeby’s recommendation number 15:

- (b) Children who do not wish to enter a post-primary school should remain at the intermediate school for a third year and even portion of a fourth if need be. The intermediate school should be willing to take responsibility for them until such time as they secure permanent employment
- (c) Children who do not intend to prolong their full-time schooling for more than one year beyond Form II should be encouraged to stay at the intermediate school for that year. [i.e. to do a third year at intermediate.]
- (d) The present rule demanding from a parent of a child entering Form III of an intermediate school a guarantee that he [or she] will not proceed to full-time post-primary education should be abolished. Facilities should be provided for children in groups (b) and (c) above who change their minds after Form III, to transfer to a post-primary school. The bigger post-primary schools might establish transition classes for such children: in others special coaching might be given.<sup>113</sup>

In Beeby’s notes to this recommendation he stated that this was an attempted compromise to suit the aspirations of students who wished to stay at a three-year intermediate school. But in one important respect recommendation 15 was not a compromise; rather, Beeby had wanted to differentiate the academic subjects from

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111. Beeby (1938), p. 211.

112. Beeby (1938), p. 211.

113. Beeby (1938), pp. 226-230.

what Beeby termed the “realistic” ones.<sup>114</sup> He sought to remove the temptation for intermediate schools to offer academic courses modelled on secondary school lines, thereby leaving intermediate school staff free to expand the horizons of their students, in other words develop exploratory programmes.

Beeby believed that if a fourth form did develop at an intermediate school then it should be regarded as a leaving form, (a terminal form) that would serve to prepare students for civic and industrial life. Extracurricular experiences would be more frequent for these students, he suggested. They could be observers or temporary workers at various firms, a transition from school to work. This philosophy, of an extended intermediate school or middle school acting as a terminal institution, arose frequently in Beeby’s report.

As Watson stated “in theory he [Beeby] favoured the four-year ‘middle school’, but felt it to be impractical at the time.”<sup>115</sup> More importantly, perhaps, it could be argued that the concept of three- and four-year middle schools that gained momentum in the 1990s had an historical antecedent in Beeby’s work. Although the contexts in which both models were debated were not identical, for example these four-year schools of the 1930s were to be solely terminal, sufficient similarities exist between them for this conclusion to be drawn.

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114. Beeby (1938), p.227.

115 .Watson (1964), p.70.

Clause (b) of Beeby's recommendation 15 further suggested that the intermediate system of two years was seen by Beeby as an interim measure. To support this claim, recommendation 29 stated that the intermediate school should revert to the name 'junior high school'.<sup>116</sup> Beeby explained that this minor change in terminology in fact marked a major change in direction. In other words, to have retained the "intermediate" label would have reinforced the view that such a school would be positioned between two others. By comparison, a return to the title junior high school would, in Beeby's opinion, "emphasize the fact that the school has a function of its own which can be satisfactorily exercised only if it is given a status equal to that of other schools within the system."<sup>117</sup>

Watson argued the importance of this recommendation, that the "junior high school" label be reemployed. Quoting Beeby, he pointed to the central role that the new junior high schools could perform:

So far, indeed, from the junior high school being regarded as a mere link between two fixed units, it might conceivably be made the pivotal point of the reorganization of the whole system. A reorganized and enlivened junior high school, that is to say, might be the centre around which plans for the future of primary and post-primary schools could revolve."<sup>118</sup>

Beeby concluded his report with the observation that "No real change can take place in any part [of a schooling system] if the rest remains unaltered."<sup>119</sup> Did this mean that Beeby was advocating a complete over haul of the system? Watson commented

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116. Beeby (1938), p. 244.

117. Beeby (1938), p. 244.

118. Watson (1964), p. 70 citing Beeby (1938), p. 244.

119. Beeby (1938), p. 244.

that in 1938, 60 percent of students were leaving school by the end of Form III. This meant that a three-year intermediate school would have been viable as had been the junior high schools of the 1920s, but only as long as the school leaving behaviour of the great majority of pupils didn't change. Nevertheless, the practicalities of returning to a three-year structure lay outside the brief that Beeby had been given by Peter Fraser and the NZCER to investigate.

During the early 1940s, despite the financial stringencies associated with World War Two, the number of intermediate schools had grown rapidly under the Labour Government. In 1945 a government publication, *Education Today and Tomorrow*<sup>120</sup> devoted a chapter to discussing the history and future direction of the New Zealand intermediate school. After the publication of Beeby's report, intermediate education was not re-examined again, until the election of the Holland National ministry in 1949.

As Director of Education in 1940, Beeby inherited, in a very real sense, an intermediate structure that had been established in response to perceived educational efficiency needs of the 1930s, but appeared to lack a clear philosophy based on the prevalent philosophies of schooling for this age-group, particularly those that had underpinned the earlier experimentation with junior high schools. His report had attempted to outline direction for intermediate schools, whereby their governing

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120. Mason, H.G.R. (1945). *Education today and tomorrow*. Wellington: Government Printer.

authorities and staff could better understand their institution's place in the New Zealand education system. Persuading those who supported the intermediate school concept — under the more familiar “junior high school” banner — and winning over those who were opposed to the intermediate school system, however, was to prove a major challenge

## THE NATIONAL GOVERNMENT AND INTERMEDIATE SCHOOLS

Several commentators (Lee & Lee, 1996; Watson, 1964) have observed that the 1930s and 1940s were years of rapid growth for intermediate schools. During these two decades intermediates developed a strong primary school culture, staffed and lead as they were by primary principals and teachers. The philosophy of exploration and enhancing pupils' educational opportunities supplanted the junior high school concepts and practice of specialization or early experience of secondary school subjects and pedagogy. In the immediate post-war period intermediate schools were attracting more students, certainly in the larger cities,<sup>121</sup> and were being seen more widely as a preparatory institution for secondary and technical high schools.

In 1949 a National government was elected and Ronald Algie was appointed Minister of Education. Algie had reservations about intermediate schools on several fronts. First, he questioned the costs associated with them but his attention was diverted to a more pressing issue concerning the “break” between primary and post-primary institutions which he attributed to intermediates. Consequently, Algie ceased to be

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121. Watson (1964), pp. 84-87.

worried about the cost of intermediate schooling, as he had been only a few months previously.<sup>122</sup>

The Minister's belief that intermediate schools may break the continuity of pupils' schooling can be attributed to his anticipation of the consequence of raising the school leaving age to 15 years, which had occurred in 1944. This legislative change had created a stronger school base in the junior secondary school. This break, occurring as it did between primary and secondary courses of study, raised the question, for the Minister at least, of its effect on the student's development in learning. The debate over respective contributions of different educational institutions to students' learning has resurfaced frequently throughout the rest of the century, as further demonstrated in this present study. While the vast majority of students still did not stay for Form VI in the late 1940s, at least a significant percentage of them had begun to stay for Form V.<sup>123</sup>

Algie called a conference in October 1951, at the request of the Post-Primary Teachers' Association (PPTA), and posed ten questions concerning the future of intermediate education. The NZEI, for their part, were strongly motivated by this call, and came out with a clear policy statement on the place of intermediate schools in the New Zealand educational environment. Their statement on intermediate education

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122. Watson (1964), p. 101.

123. Openshaw, R., Lee, G., & Lee, H. (1993). *Challenging the myths: rethinking New Zealand's educational history*. Palmerston North: Dunmore. (Chapter 12) These authors attribute this change in high school enrolments to the introduction of the new school Certificate examination (1946), providing a Form 5 qualification pupils considered worth having.

was published in the NZEI's own magazine, *National Education* on 2 April 1951,<sup>124</sup> and a copy of this report was sent to the Minister, Ronald Algie. It reiterated the belief that intermediate schools should educate 12-to-14 or 15-year-olds. The NZEI maintained that this particular age-group had "characteristic needs rather different from groups above and below," and concluded with the remark "we believe that children at this stage will receive better provision in a separate school."<sup>125</sup> The NZEI maintained its policy<sup>126</sup> that these schools for pupils in the "middle years" should be three-year institutions.

The Minister was persuaded by these arguments and by the October 1951 Conference on intermediate education concluded that he was "satisfied that the Intermediate School was fully justified on Educational, Social and Economic grounds."<sup>127</sup> Algie added that, in his opinion, the course of intermediate instruction should be longer for some pupils,<sup>128</sup> and he announced an inquiry along these lines to be carried out by the Department of Education. The concept of two-year intermediate schools that operated from 1933 had therefore, been subjected to close scrutiny, although the notion of intermediates as both terminal (three-year) and preparatory (two-year) institutions had not been abandoned. The PPTA however, remained critical of these institutions, regarding them as costly and unnecessary additions to the New Zealand education system.

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124. New Zealand Educational Institute. (1951, April 2). Report on intermediate schools: Dominion executive of the institute delivered to the Minister of Education. *National Education*, 33 (354), p.98.

125. New Zealand Education Institute (1951, April 2), p. 98.

126. Beeby (1938), p. 34.

127. O'Neill, B. (Ed.) (1984). *The intermediate school in New Zealand: The case for*. Wellington: New Zealand Intermediate Schools Principals' Association, p. 3.

128. Lee & Lee (1996), p. 161. "[Pupils] wishing to leave school at age 15 would stay [at intermediate school] for three years."

The NZEI were more welcoming of intermediates. In August 1950, for example, the national president of NZEI, J. Box wrote to the Institute's members: "You will recall that institute policy recommends a three-year intermediate system with independent schools."<sup>129</sup> He was keen to argue for extending intermediate schooling further, in the belief that "the extension of the intermediate school system with three or even four year courses will not only provide a solution to the accommodation problem of the next decade but will also be sound educational policy."<sup>130</sup> Accordingly, before the population bulge of the 1950s became evident, a lengthened intermediate school course was being suggested for government consideration on the grounds of enhancing educational efficiency.

While such statements satisfied a significant sector of the New Zealand education community, such as the NZEI and the Intermediate School Principals' Association, there were still groups opposed to the development and expansion of intermediate education. Even after Beeby had published his 1938 report, and Algie had addressed the 1950 Conference on Intermediate Education — in which both advocated a longer course of study at intermediate level — opposition to such a proposal remained. In particular the Post-Primary Teachers Association (PPTA) felt threatened by this approach.

In 1954 the PPTA executive boldly declared that "there was no justification at all for a separate school between the primary and post-primary levels, and that, in any case,

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129. Box, J. (1950, August 1). Intermediate school policy and salaries: A letter from the president. *National Education.*, 32 (347), pp. 242-243.

130. Box (1950, August 1), pp. 242-243.

intermediate schools were expensive.”<sup>131</sup> At stake here was the definition of educational efficiency, wherein the PPTA alleged that intermediate schools were more expensive than other forms of educational institutions. The NZEI executive, it will be recalled, believed that intermediares contributed to the overall efficiency of the New Zealand schooling system. But the PPTA was sufficiently concerned about the direction of intermediate schooling that they requested the NZCER to carry out a second review of intermediate education. This review was conducted by John Watson, the NZCER’s Director, between the years 1954-58. As Watson related, 1959 was spent “collating and analyzing this great mass of material.”<sup>132</sup>

#### THE WATSON REPORT (1964)

John Watson’s report used a more comprehensive approach<sup>133</sup> than had Beeby and provided an historical framework as well as detailed research of current practice. As Watson claimed “we were more concerned in the late fifties with the pedagogical justifications for setting up an intermediate school system.”<sup>134</sup> This justification was given in his report, published in 1964 some ten years after its commissioning. Watson’s survey of intermediares had been commissioned by the PPTA but it was unhappy with many of his 21 recommendations. The first recommendation was for

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131. Watson (1964), p. 107, citing the NZPPTA newsletter of March 1954.

132. Watson (1964), preface p. 1. Watson went on to comment “The delay in publishing this final report has been unexpected but unavoidable in view of the increased professional responsibilities of the Council’s small staff in recent years.”

133. Watson’s approach was to gather data from 45 primary schools with Year 7 & 8 students and 45 intermediate schools. As well further data was gathered from 145 contributing primary schools, 78 secondary schools as well as information from pupils, parents and administrative officials. In addition tests in arithmetic and spelling were administered, and an investigation of School Certificate Examination results was undertaken. Watson (1964), p. 108.

134. Watson, J. (1977). Evaluating and reshaping the system, *Current issues in education*, 4. p. 58.

the intermediate system to be continued, extended and strengthened. Wherever possible these schools should be independent institutions (recommendation 2), Watson suggested. More specifically, these institutions could be established near or on adjacent sites to secondary schools (recommendation 7) and in rural communities intermediate schools should be established more widely and rapidly (recommendation 8).

Watson, not surprisingly, was obliged to consider the duration of intermediate schooling. He recommended (9) that the two-year status quo should remain, but supported an extension in certain circumstances:

Perhaps at some later stage, when the co-operation of the two levels [primary and post-primary] is much more effective than it is now, and when the majority of adolescents remain at school beyond the age of 16 years, it may be desirable to lengthen the intermediate school to capitalize on its undoubted potential for providing a well-balanced general education for all pupils before they embark on the special courses of a senior secondary school.”<sup>135</sup>

This recommendation differs significantly from the philosophy underpinning the recommendations of Beeby in that it suggested the extension of the length of time a student would stay at intermediate school independent of the suggestion that the intermediate school would serve a purpose as a terminal institution. Each of the major reviews of the intermediate structure from 1932 to 1964 therefore, had reiterated the need for the length of intermediate schooling to be reconsidered and for serious account to be taken of a three-or four-year course of instruction. Each review placed the intermediate school within a middle school structure (in so far as they were seen

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135. Watson (1964), p. 424.

to be stand-alone institutions of at least three-years' duration), and provided reasons for young adolescents to be educated in this institutional structure.

In the interval between Watson undertaking his study and its publication two other reports were commissioned and presented; the Australian Wyndham Committee Report (convened in 1953) and the Currie Commission Report (convened in 1960). The Wyndham Committee report, released on 28 October 1957, was not complimentary about intermediate schools. This committee concluded that the intermediate school “[did] not appear to offer any real solution to the problem [of secondary school reorganization],”<sup>136</sup> and that it appeared to sit awkwardly between primary and secondary schools. The result was that New Zealand intermediates were “poorly integrated with neither.”<sup>137</sup>

While this comment by the Wyndham Committee may have been true of the relationship that existed between intermediate and secondary schools generally at that time, it undervalued the many structural and philosophical links that existed between intermediate schools and the primary school service, of which they were part. The Currie Commission Report, published in 1962, however appeared to support the New Zealand intermediate school structure. Lee and Lee in summarising the report's findings commented that the Commission found:

Intermediates ... offer many educational advantages over primary schools: better classification of pupils; a smoother passage of pupils from primary to secondary schooling; specialist tuition, particularly in subjects such as music, art, physical education, and

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136. Lee & Lee (1996), p. 161.

137. The Wyndham Report (1957), cited in Lee & Lee (1996), p. 161.

manual subjects; and they were “more economical and efficient”, both educationally and financially.<sup>138</sup>

This statement is particularly relevant in light of the PPTA’s earlier claim that intermediate schools were too expensive when compared with other structures in the education system. However, the Currie Commission went a step further and advocated the setting up of Form I to VI colleges in rural areas too small to sustain intermediate schools.<sup>139</sup> Such a recommendation was at odds with that of Watson, who later reported in favour of speeding up and extending the establishment of intermediate schools in rural areas. The first experimental Form I to VI colleges had begun in 1963 and by 1966 eight were in operation around New Zealand.<sup>140</sup>

Of the Currie Commission’s 14 recommendations on intermediate education, thirteen were virtually identical to those arrived at by Beeby 24 years earlier.<sup>141</sup> A further development that arose out of the Currie Commission recommendations was the establishment of the Curriculum Development Unit in the Department of Education (1963) and its work on drafting Form 1 to 4 syllabi.<sup>142</sup> For example, the 1964 newly established Science Revision Committee in the Department of Education developed the first Form I to IV science syllabus.<sup>143</sup> This recognition of similarities of learning across these four years reflects the similar syllabus rewriting of 1927 and were a

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138. The Currie Commission Report (1962), cited in Lee & Lee (1996), p. 162.

139. Cumming & Cumming (1978), p. 350.

140. Cumming, & Cumming (1978), p. 350.

141. Lee & Lee (1996), p. 162. Unlike Beeby, however the Currie commission envisaged secondary education beginning at Form 1.

142. Cumming & Cumming (1978), p. 349.

143. Ewing, J. L. (1970). *The development of the New Zealand primary school curriculum 1877-1970*. Wellington: New Zealand Council for Educational Research, p. 244.

precursor to the major, and in many ways similar, curriculum reforms of the 1990s.<sup>144</sup> The creation of an age-appropriate syllabus was based on an understanding of the perceived needs of the adolescent as being in some way identifiable and different from the age-groups preceding and following these middle years of educational development. This concept of adolescence will be investigated more fully in chapter 3.

## ECONOMIC PROSPERITY AND EDUCATION

The 1950s and 1960s was a period of comparative economic prosperity for New Zealand and a time of rapid population growth.<sup>145</sup> While various conferences and commissions were assessing and investigating the merits of the intermediate school structure school rolls continued to increase and new schools were opened. With this rapid growth there was little time or energy for reflection, with the result that educational planning tended to be reactive rather than prospective. Nevertheless, teachers and school authorities were under pressure trying to cope with larger numbers of pupils who entered their institutions. By comparison, the decade of the 1970s was to be a time of renewed discussion and debate over the place of intermediate schools in the New Zealand education system. As O'Neill has commented:

A number of regional and local teacher courses to discuss the changing needs of Intermediate schools were held between 1970

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144. Ministry of Education. (1993). *The New Zealand curriculum framework*. Wellington: Learning Media.

145. Cumming & Cumming (1978), pp. 349-350. In the twenty-one years from 1945 to 1966 the State primary school roll increased from 243 600 to 485 700 and the secondary roll from 53 700 to 162 150. The total population increased at a rate of an average 2.1 percent per annum.

and 1976 together with two important National conferences in 1974, Wallis House and Lopdell House.”<sup>146</sup>

In 1972 Phillip Amos was appointed Minister of Education in the Labour (Kirk) government. Amos set up the Educational Development Conference (EDC), superseding the Educational Priorities Conference established by his predecessor, Brian Talboys.<sup>147</sup> As the names suggest, these conferences were to look at the needs of the future and to plan for them in a systematic manner. In one conference document *Improving Learning and Teaching*,<sup>148</sup> (The Lawrence Report), issues were raised about the transition function of intermediate schools and the adverse effect these had on learning and teaching. The report reiterated the comments made in the early-1950s about the effect that the ‘break’ between educational institutions had had on students’ learning. Furthermore, the Lawrence Report commented on the lack of a unified teaching profession and explained that this deficiency had meant that many of the recommendations of the Currie commission were not able to be implemented.<sup>149</sup>

As part of the Education Development Conference of 1974 a separate report, the Holmes Report also referred to intermediate schools.<sup>150</sup> This report agreed that the intermediate school seemed to have been a pragmatic solution to a number of problems. This report also agreed that the disadvantages of intermediate schools were

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146. O'Neill (1984), p. 3.

147. Cumming & Cumming (1978), pp. 360-361.

148. Educational Development Conference. (1974). *Improving learning and teaching: Report of the working party on improving learning and teaching*. Wellington: Government Printer (The Lawrence Report).

149. Lee & Lee (1996), p. 163.

150. Educational Development Conference. (1974b). *Directions for educational development: A report prepared by the advisory council on educational planning*. Wellington: Government Printer, pp. 111-112.

not so evident that they would recommend their abolition with any confidence. This report also endorsed the concept that, “other variations are possible, for example Form 1 to 3 schools.”<sup>151</sup>

The NZEI were unwilling, however, to accept either the criticisms of the EDC, or of the Minister. In the Institute’s own publication, *National Education*, in November 1973, the following statement appeared:

There seems to be general public and professional acceptance of the usefulness of a change from the primary school organization at an average age of 11 plus. At this age a child is physically and emotionally stable enough to accept a change of this sort and it is very common at this point that overseas systems change over from primary to secondary education... There was evidence that intermediate schools have considerable success in creating common school spirit.<sup>152</sup>

This statement from the NZEI was predictable. It was a direct descendant from the Institute’s strong support for three-year middle schools since the 1920s, and goes some way to explain the depth of acceptance of the ideas first expressed in the Hadow Report of 1926. The frequent support the NZEI had given publicly, first to junior high schools in the 1920s and then to intermediate schools since the 1930s, was not without its own costs to the institute. The majority of the NZEI membership were, and are, primary school teachers and principals, and their interests have not always been compatible with the interests of intermediate schools. However, NZEI policy consistently supported the development of intermediate schools.<sup>153</sup>

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151. Educational Development Conference (1974b), p.111.

152. New Zealand Educational Institute. (1973, November). Confidence in intermediates. *National Education*, 55 (603), p. 291.

153. In 2003 the executive of the NZEI funded a campaign whereby their officers visited every intermediate school in New Zealand to publicly express the institute’s support for intermediate school

In an attempt to provide an open forum for the discussion of the varying union concerns with regard to intermediate schools Amos called a further conference in 1974, the Futuna Conference on Form 1 and 2 schooling. While this conference identified six objectives for Form 1 and 2 education Lee and Lee have suggested that “[their] recommendations shed little additional light on the distinctive functions of intermediate schools because they could be seen to apply equally to any level of the schooling system.”<sup>154</sup>

### **INTERMEDIATES STILL UNDER SCRUTINY**

In 1976 intermediate school enrolments reached their peak, with 77,315 students being educated in 140 intermediate schools. Although these enrolments accounted for some 71.6 percent of pupils in Form 1 and 2,<sup>155</sup> they masked ongoing departmental opposition to intermediate school education. In an attempt to more precisely determine the educational and other contributions made by intermediate schools the Department of Education decided to appoint a further committee to survey intermediate education. The Milburn Committee (1976) consisted of James Milburn, John Magee, and Kenneth McKay, all three intermediate school principals. The Milburn Committee noted that:

Several districts reported difficulties in convincing local communities of the desirability of establishing an Intermediate school. No district reported any criticism or opposition to the school once it had been operating for a period and those districts

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education at a time when Ministry of Education initiated Network Reviews appeared to be targeting intermediate schools for closure.

154. Lee & Lee (1996), pp 164-165.

155. Lee & Lee (1996), p. 166.

which had canvassed the opinions of parents with children at intermediate schools reported a very high degree of approval.<sup>156</sup>

Although the Milburn Committee produced a positive report criticism of the intermediate philosophy was not stymied totally. For example, one commentator in the press declared that “[Intermediate schools are] havens where children aged 11, 12 and 13 can learn to experiment with disruptive techniques, sex, drugs and crime; places where good children turn bad.”<sup>157</sup>

Intermediate school education between 1975 and 1985 underwent a period of increasingly public criticism. Both their structure and philosophy of education were placed under scrutiny. The increasing social problems associated with the large number of students reaching adolescence, created a climate of poor public relations in the popular press for intermediate schools. While the number of intermediate schools had continued to increase throughout the late-1970s and early-1980s, peaking at 148 in 1983, school rolls in intermediate schools began to decline. By 1989 only 65.9% of intermediate-aged students were enrolled in intermediate schools.<sup>158</sup> These percentages continued to decline in the early-1990s and by July 2000 only 55 percent of intermediate-aged students were enrolled in intermediate or middle schools.<sup>159</sup>

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156. Milburn, J.D. (1977). *Report of the 1976 national survey of intermediate schools*. Wellington: Department of Education, p. 65.

157. The New Zealand Herald. (1977), cited in Watson, (1977) p. 244.

158. Minister of Education. (2002). *New Zealand schools, Nga kura o Aotearoa: A report on the compulsory schools sector in New Zealand 2001*. Wellington: Origin Design Company. pp. 89-91.

159. Education Review Office (2000), p. 4.

This lack of confidence in intermediate schools was reported in official documents.

For example, the Curriculum Review (1986) noted, from submissions received, that many parents were critical of intermediate schools. The review reported:

These concerns related to the unsettling influence on students of a change of school at a time when students were also coping with accelerated pubertal change.<sup>160</sup>

One of the key tenets of intermediate school education — that they catered for the specific needs of the emerging adolescent — was now in turn, regarded as problematic. In order to ascertain the depth of dissatisfaction with intermediate schooling the New Zealand Intermediate School Principals' Association (NZISPA), in 1989, undertook a survey of parents from among 130 of the 148 intermediate schools. Ninety-nine schools (76%) responded and 22 714 parent questionnaires were returned. Seventy-one percent of respondents thought that two years at intermediate was long enough, while 24 percent felt that children should remain for a longer period of time. However, only 42 percent of respondents expressed positive support for intermediate schools while 44 percent reported that they did not like these institutions or preferred an alternative.<sup>161</sup>

Dissatisfaction with intermediate education was not the sole prerogative of parents.

David Lange, former Prime Minister and Minister of Education for example, expressed his lack of confidence in intermediate schools in early-1990 by stating:

[Intermediate schools] took youngsters from the security of their primary schools, gave them two years to become familiar with them, then placed them in another strange environment at high

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160. Ministry of Education. (1986). *New Zealand curriculum review*. Wellington : Learning Media, p. 84.

161. Lee & Lee (1996), p. 166.

school. Falling rolls and strong community opposition to the philosophy behind them would no doubt lead to their demise.<sup>162</sup>

Nevertheless, Lange's successor as minister of education in 1989, Phil Goff, held a different view. The latter was evidently convinced that:

[intermediate schools] made a considerable contribution to a first rate education system; they provided a useful bridge between primary and secondary education, they widened the range of subjects for children; and their style of education helped pupils in their adjustment to life at secondary school.<sup>163</sup>

It was into this climate of public dissatisfaction, not only with intermediate schools but with the administration of schools generally that the educational reforms of *Tomorrow's Schools*, were introduced.

During the decades when population growth was evident the philosophy of intermediate schools — as articulated by Strong, Beeby, and Watson and in reports from various conferences — had seldom been critiqued publicly. However, by the early-1990s the combination of falling school rolls, the educational reform movement — as reflected in the Picot Report and *Tomorrows Schools* — and the development of alternative educational pathways within secondary schools, subjected intermediate schools to closer scrutiny. The outcome was not often favourable for intermediate schools.

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162. Lee & Lee (1996), p. 167.

163. Goff, P. (1990, 13 August). Otago Daily Times, cited in Lee & Lee (1996), p. 167.

## THE 1990s

The publication of *Tomorrow's Schools*,<sup>164</sup> in August 1988 outlined a new philosophical approach to the delivery of educational administration for New Zealand. Prior to 1 October 1989 — when the Picot reforms were implemented — New Zealand had a centralized, hierarchical system of state schooling. Primary and intermediate schools were administered by regional education boards. Therefore, the transference of authority from regional education boards to local school board of trustees, particularly for the primary service, created a climate of optimism and innovation. New boards of trustees, consisting of elected parents, a staff representative and the principal, were intended to implement the “community empowerment” philosophy of the Labour government.<sup>165</sup>

The educational policy of the National (Bolger) Government’s Minister of Education, Lockwood Smith, clearly pointed to the importance of parental choice in all aspects of schooling. According to Lee and Lee (1998) such a policy meant that “school communities, through their boards of trustees, were invited to negotiate the reshaping of schooling in their area.”<sup>166</sup> This policy was further explained in the policy *Investing in people: Our greatest asset*,<sup>167</sup> where the Minister outlined the process of

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164. Ministry of Education. (1988). *Tomorrow's Schools: The reform of education administration in New Zealand*. Wellington: Learning Media.

165. Picot, B. (1988). *Administering for excellence: Effective Administration in Education*. Report of the taskforce to review education administration. Wellington: Government Printer, p. 4.

166. Lee, H., & Lee, G. (1998). Middle schools or muddled schools? *Developmental Network Newsletter*, 1, p. 32.

167. Smith, L. (1991, July 30). *Education policy: Investing in people our greatest asset*. Wellington: Government Printer, pp. 20-21.

Education Development Initiatives (EDI's), or the process by which local communities could endeavour to reshape schooling in their local areas.

The *Tomorrow's Schools* policy is a further example of an official attempt to prescribe what was seen to be a more efficient education system, albeit in predominantly administrative terms. In the early-1990s several New Zealand educational communities faced the prospect of rapidly falling school rolls, and the National government claimed that difficult fiscal decisions needed to be made regarding the viability of some schools. This policy devolved much of the decision making process to the appropriate local communities, under the auspices of 'parental choice.' In reality local communities found the decisions just as difficult to make as would have the Ministry Of Education but the central education bureaucracy seemed to have distanced itself from the exercise while appearing to have give an opportunity for exercising real choice to local communities. Where an all pervasive Department of Education had once made many, if not all, the decisions a much smaller Ministry of Education was required by legislation to operate a "hands off" policy in this regard, in the early years at least. It is within this political and educational context of the 1990s that middle schools were proposed. Provisions within the *Tomorrow's Schools* report had also made it possible for middle schools to be established in some communities.

## CONCLUSION

It will be recalled that one of the first middle schools to be established worldwide came into existence in Nelson in the mid-1890s. While this institution was short lived

this school's legacy remains significant. The Nelson Central School stimulated a movement that developed through the twentieth century with the introduction of the junior high school 'experiment' in the early 1920s. This experiment — which tried to combine the central system of England and Scotland with the junior high structure of America — did much to encourage discussion about the most appropriate institutional arrangement to cater for the needs of this particular age-group of students. While the New Zealand intermediate school of the early-1930s seemed to have adopted a different orientation from the earlier junior high school model, the work of Beeby, Watson and others articulated a unique New Zealand middle school philosophy, that of the intermediate school. The educational debate regarding the structure of a New Zealand middle school initiated in the early-1990s continued the development of this unique philosophy and will be investigated in greater depth in chapter 5.

Owing to the structure of the New Zealand schooling system, with its historically rigid division into primary and secondary sectors, the development of a flourishing middle school movement was a difficult one. In fact it has been suggested that the establishment of middle schools in New Zealand has been more problematic than in other countries educationally similar to New Zealand, such as Australia. However, there is sufficient evidence to conclude that for some 110 years there has been a predisposition among some New Zealand educators, politicians and educational officials toward having stand-alone schools for children in "the middle years."

It is not surprising, therefore, to discover that debate continues over whether or not an intermediate school should provide its students with early specialization in traditional secondary school subjects or provide an exploratory type programme to prepare students for the adult world they will later enter. The idea expressed in the 1930s that the intermediate school should be a terminal institution was largely abandoned when the school leaving age was raised to 15-years in 1944, and in particular when the school leaving age was raised to 16-years in 1993.

The economic and social reality of governments and society expecting their youth to stay at school and to increasingly undertake post-primary and tertiary educational opportunities during the late twentieth century has meant that many students remain at school well past their sixteenth year. Therefore, the educational climate suggested by Beeby in 1938 for establishing a three or four year intermediate school (or middle school as they were to become) had been formed. The concept of middle schools has moved beyond Watson's belief of a new function for intermediate schools, that of preparing all students for secondary school. By the 1990s, as further chapters will outline, proponents of middle schools suggested that these schools provide the "last, best" opportunity to develop citizenship prior to entering a senior secondary school.<sup>168</sup>

This chapter has outlined the historical development of New Zealand age appropriate schools for the "middle years" since 1894. The development of these schools, it has been argued, has been due in part to the arguments of educational efficiency prevalent

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168. The work of the NIMSA and Beane et al. will be investigated in Chapter Five.

at the time. The Nelson Central School model developed as a response to the provision of secondary education in Nelson in the late-1890s. The junior high school responded to the perceived needs of students staying longer at school after WW1. The formation of intermediate schools in the early 1930s was as a political response to the union and financial pressures of the time. Their development during the rest of the century was as a response to the lengthening stay pupils experienced at school and the pressure of rapid population growth. Frequently, and often at the time of a change of government, arguments about the cost effectiveness of intermediate schools were raised. The political expediency which can be termed educational efficiency developed as a key trend for the development of a middle level schooling structure in New Zealand.

A second, and equally important trend was that of policy importation, and in particular the influences of England and America on the development of educational structures in New Zealand. This trend will be investigated in further depth in the following chapter. Chapter 2 will investigate in some depth the development of middle schools, as distinct from intermediate schools, in the New Zealand context during the period 1988- 2003.

## **Chapter Two**

### **The Development of New Zealand Middle Schools: 1988-2003**

#### **INTRODUCTION**

As outlined in chapter 1, the late-1970s and early-1980s were a time of increased dissatisfaction — in certain educational and political quarters — with intermediate schools in New Zealand. Although the Holmes Report<sup>1</sup> of 1974 had recommended that intermediate schools remain, the conference had not endorsed this type of schooling to the same extent as had previous educational reviews. With gradual roll decline, owing mainly to a decline in numbers of the school-age population during the early 1980s, many intermediate school authorities had come under increasing pressure to justify this form of schooling.

The administrative reforms of the late-1980s in education also proved to be a “double-edged sword” for intermediate education. On the one hand, legislative changes provided for the possible translation of two-year intermediate schools into three- or four-year middle schools. On the other hand these legislative changes allowed contributing primary schools to retain Year 7 and 8 students. This process of primary school recapitation undoubtedly provided a challenge to the traditional role that intermediate schools had — particularly in urban areas<sup>2</sup> — of providing schooling for Year 7 and 8 students.

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1. Report of the Advisory Council on Educational Planning. (1974). *Directions for educational development*, p. 111.

2. During the period 1940-1990 provision for Year 7 and 8 schooling in full primary schools, Form 1 to 7 colleges (after 1963) and Area schools tended to occur mainly in rural areas.

Under the rubric of these allegedly necessary “reforms” undertaken in the late-1980s a policy of educational efficiency continued to be actively pursued. For the first time, owing to these changes, educational efficiency could be determined by the communities in which the intermediate schools were located. In other words, parents could decide to support or not support the local intermediate school. Ironically, the changes of the late-1980s — while giving more responsibility to local communities — tended to reinforce the direct political involvement of the minister of education in local issues. Changes in school class, which determined the structure of schools, for example, while more readily available in the *Tomorrows Schools* era, could be made only by the minister of education.

The creation of eight middle schools<sup>3</sup> during the mid-1990s was seen by some educational commentators (Kerr, 1996; Nolan & Brown, 2000; Ward 2001) to signal the establishment of a new school structure for educating emerging adolescents. Others (Cooney, 1997; Cross, 2003; Lee & Lee, 1998, 2000), however, saw this development as unhelpful because it was seen to be derived from the already vague educational philosophy of intermediate schools. The philosophical confusion identified by some educational commentators surrounding the creation of New Zealand middle schools revolved around three main factors: whether or not the distinction that middle schools and junior high schools were different, whether parents and pupils should be able to choose between three-year and four-year institutions, and the appropriate placement of Year 6 students.

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3. Raumanga (Whangarei); Clover Park (Auckland); Southern Cross (Auckland); St. Andrews (Hamilton); Berkley Normal (Hamilton); Cambridge (Cambridge); Sunset Junior High (Rotorua), and Tweedsmuir Junior High (Invercargill).

This chapter analyses the development of middle schools during the 1990s in the New Zealand context. It identifies the key concern articulated by educational commentators that further research was required to establish the credibility or otherwise of middle schools for the New Zealand educational environment. This chapter also explores the theme of educational efficiency as discussed in the previous chapter within the context of the 1990s and early-2000s. Furthermore, this chapter analyses the resistance of the Post-Primary Teachers' Association (PPTA) to the establishment of middle schools. In discussing the key criticisms of middle schools proposed by the PPTA, this chapter also presents three key concerns expressed by educational researchers Lee and Lee (1998, 1999). In addition this chapter highlights the issue of policy importation and its impact on the development of New Zealand middle schools, especially from the American educational environment.

## DEVELOPMENTS IN THE LATE 1980s

As mentioned earlier, the rapid growth in intermediate school rolls and in the number of intermediate schools during the 1960s and 1970s<sup>4</sup> had tended to mask debate about the length of time students could enrol at these schools. The energy of some intermediate school advocates, such as intermediate school principals during the 1970s, had been expended on meeting the immediate concern of trying to accommodate those students who were arriving at intermediate schools in increasing

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4. In 1960, 36.3 percent of all Year 7 and 8 students attended an intermediate school (31,449 pupils). By 1976, 71.6 percent of all year 7 and 8 students (representing 77,315 pupils) attended 140 intermediate schools. See Lee & Lee, (1996), pp. 163-165.

numbers.<sup>5</sup> By the 1980s, however, there had been a growing awareness that the recommendations expressed by Beeby (1938), in support of a three- or four-year intermediate school becoming a terminal institution for those pupils leaving school without secondary qualifications, were outdated and inappropriate. Generally students in the 1980s stayed at secondary school until they were 15 years old and had become candidates for the national Form 5 (Year 11) School Certificate examination. Some twenty years earlier John Watson had recommended that an extension of intermediate education should be considered when the school leaving age was raised to 16.<sup>6</sup> This recommendation began to develop credence among some educational commentators from the late-1980s, as the call to increase the school leaving age to 16 years gained momentum.

Some intermediate school leaders, then, remained adamant that they wanted to see the duration of time students enrolled at intermediate school lengthened. The O'Neill Report (1984), completed for the New Zealand Educational Institute (NZEI) by a committee of intermediate school principals stated that “some intermediate school principals support the development of a three- or four-year [intermediate] school. The later was intended when the first intermediate was established.”<sup>7</sup> The actual school structure envisaged by these principals remained, however, unclear. Whether they were seeking a three- or four-year structure similar to that of Kowhai Junior High School, or a middle school modelled on what was current in the United States of

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5. Thwaites, D. (1997, August). *The New Zealand middle school: What it is and what it might become*. Paper presented at an Intermediate and Middle Schools Principals seminar on middle schooling, Wellington, p. 1.

6. Watson (1964), p.424.

7. O'Neill (Ed.) (1984), p.6.

America, or were simply reacting in an indefinite way to the immediate situation of falling rolls (since the early 1980s) in their schools, is open to interpretation. The more plausible answer is a combination of the three considerations was entertained. Internationally, schools for students in the middle years frequently had a duration of longer than two years.<sup>8</sup> It will be recalled from chapter one that this had been so previously in New Zealand.

The 1987 Ministerial Taskforce to Review Educational Administration (the Picot Committee) offered a possible means through which intermediate school education could be extended. According to the NZEI Policy document on middle schools published in 1994, the working party on *Tomorrow's Schools* had in 1988 recommended that there be a change in the funding bands for pupils from the existing four bands to three: J1- S4, F1- F4, and F5- F7.<sup>9</sup> While this recommendation had not been implemented it remained contentious through the 1990s. But there is no doubt that the recommendation pointed to the reality that a different structure of schooling for specifically meeting the perceived needs of this age-group was being seriously contemplated by some educators.

The policy outlined in *Tomorrow's Schools* involved the devolution of decision making to local communities where the people who were most directly affected by decisions were empowered to make them. Early indications of how this policy might

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8. America had developed four-year junior high schools, the United Kingdom during the 1970s and 1980s had established four-year middle schools, and a number of European and Pacific Rim neighbouring nations were beginning to develop such schools. ERO (2001), pp. 53-55.

9. New Zealand Educational Institute. (1994). *NZEI policy on middle schools: Branch circular 1994/46*. Wellington: Author, p. 6

impact on intermediate school development can be gained from studying the recommendations of the Department of Education's *Intermediate Schools Policy*, issued in June 1988. While this policy predates *Tomorrow's Schools* by two months it is based on a similar philosophy of community choice. Recommendation 11.03 stated:

[What occurred] in the sixties and seventies has given way more recently, to questions relating to the rights of parents to choose the type of education they feel most appropriate for their children.<sup>10</sup>

Decision making prior to 1988 had been undertaken by a highly centralized Department of Education. Under the *Tomorrow's Schools* model this authority was now to be devolved to local communities and in particular boards of trustees.<sup>11</sup> The legislative changes that followed this review of administrative policy for education set out the possibility for local communities to choose new structures of schooling if they considered that these would better meet the perceived needs of their children.

Central to both these reports, therefore, were two key ideas that would permit the development of middle schools in New Zealand. The first was the transfer of administrative and employment responsibilities from the regional education board to individual school's boards of trustees. The second was the abolition of school zoning.<sup>12</sup> School zones had enshrined the belief that students had an inalienable right to attend the school geographically closest to their home. With the abolition of school zoning, as part of these administrative reforms, the Labour government's intention

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10. Department of Education. (1988). *Intermediate schools policy: In-house report to combined management*. Wellington: Author, p. 27.

11. Ministry of Education (1998), p. 3.

12. Ward, R. (2001). *The development of a middle school*. Unpublished doctoral dissertation. University of Waikato, p. 59.

was to create a climate of choice where parents and their children could choose the school that best suited their perceived needs. As well as providing for choice, the abolition of school zoning provided an opportunity for competition between schools to occur. The prevalent political belief was that the most competitive schools would also be those that provided the best educational environment.<sup>13</sup> This business management model however, has been subjected to critical scrutiny.<sup>14</sup>

The procedure for school authorities to seek a change in status was set out in section 53 of the Education Amendment Act (1989). For an intermediate school such an application required a change in class to a “composite school” status because no provision was made in the Act for new school structures such as middle schools. Accordingly, any new school structure that covered two existing areas of enrolment — such as a middle school encompassing primary and secondary pupils — was automatically designated a composite school. This designation continues to be employed.

While the intention of the 1989 Education Act had been to allow parents to have the right to choose the style or type of education they felt most appropriate for their children, it is noteworthy that permission to change the structure of a school was assigned solely to the minister of education.<sup>15</sup> At the very point where local initiatives

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13. Department of Education (1998), pp. 98-99.

14. For example Mckenzie, D. (1999) The clouded trail: Ten years of public education post-picot *New Zealand Journal of Educational Studies*, 34 (1), pp 8-17.

15. Ministry of Education. (1996). *Application for change of class*. Wellington: MOE., p. 32. In this document the following statement appears “The Ministry then informs the Minister of the application, the educational and economic viability of the proposed change, the consultation process, and the

appeared to have received official support, the personal intervention of the minister and, therefore, the recommendations of the new Ministry and the minister's own personal opinions — what he or she considered would be best for the community — was given special credence in the legislation. These education reforms, however, offered a way for the translation of intermediate schools into middle schools. As one intermediate principal explained:

With the intermediate school system under siege in some areas... the Association's [NZISPA] executive committee was keen to explore other ways in which the intermediate school could not only continue to provide well for its students, but to do so in even better ways.<sup>16</sup>

Having considered the findings of the Department of Education's *Intermediate School Policy* (1988) and being attuned to the new political climate of parental choice the New Zealand Intermediate School Principals' Association (NZISPA) executive sought to gather information on public perceptions of intermediate school education. In 1989 questionnaires were distributed to 130 intermediate schools and 99 responded.<sup>17</sup> The results of this questionnaire have been outlined elsewhere (p.78), but there was no doubt that the results were disappointing for those parties associated with intermediate education. Readers of the survey were bound to conclude that a change in direction was required in order to bring new life to the intermediate school movement.

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outstanding concerns (if any) raised by the schools whose rolls might be affected. The Minister considers all this material and then makes a decision."

16. Kerr, A.K. (1996). The case for the middle school: A better educational deal for our emerging adolescents. *Developmental Network Newsletter*, 3, p. 15.

17. Lee & Lee (1996), p. 166.

The legislative changes of 1989 also enabled existing contributing primary schools (those who sent their Year 7 and 8 students to the local intermediate school) to consider recapitating, thereby retaining their Year 7 and 8 students. This move also required a change-of-class for those schools to become designated as “full primary schools.” Within the policy of *Tomorrow’s Schools* such recapitation effectively provided a community with a choice in the form of schooling they desired which was not available to them under the existing contributing school structure. From 1989, therefore, parents in these communities could choose between a full primary school or an intermediate school to provide Year 7 and 8 schooling for their sons and daughters.

Contributing school recapitation, not surprisingly, applied pressure on enrolments in a significant number of intermediate schools. Many of these institutions were already experiencing a period of naturally declining student roll numbers. With a number of primary schools recapitating this created a climate of fear over institutional survival among some intermediate schools. For the national executive of the intermediate schools’ association one immediate answer to this crisis in confidence lay in the sponsoring of middle schools.

## WHY MIDDLE SCHOOLS?

In 1990 Doug Thwaites was elected president of the New Zealand Intermediate School Principals’ Association (NZISPA). As principal of Raroa Normal

Intermediate School, Thwaites was a strong advocate of New Zealand intermediate schools embracing the philosophy of the American middle school movement.<sup>18</sup> Middle schools in this context were four-year stand-alone institutions that had, over the previous two decades, begun to supersede the junior high school model in many American states.<sup>19</sup>

In a speech given to the Inaugural Middle Schools Seminar (Wellington) in 1997 Thwaites commented on his discovery of the merits of and philosophy behind middle schooling:

As I researched the question [of a rationale for intermediate education] I was able to access a 1973 copy of Educational Leadership...looming large was commentary about the phenomenon known as the Middle School and its attendant philosophy and rationale.<sup>20</sup>

After further research into the concept of middle schools he accepted a Fulbright-Hayes Fellowship. This permitted Thwaites to work for a year in a middle school in Illinois, USA, prior to taking up his first position as a New Zealand intermediate school principal. Throughout the debate over intermediate and middle schools in New Zealand since the late nineteenth century, a key issue has been that of the policy importation of ideas from abroad, particularly from the American educational environment. Thwaites' direct experience with the American middle schools community provided one of many subsequent links between key educational

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18. Thwaites, D. (1997).

19. The structural and philosophical differences between junior high schools and middle schools will be examined in some depth in chapter 5.

20. Thwaites (1997), p.1.

practitioners within New Zealand intermediate school principals, and the development of middle schools during the 1990s based upon the American middle school reform movement.

In 1990 the Minister of Education, Lockwood Smith, convened a Ministerial Taskforce on Form 1 and 2.<sup>21</sup> While many of the findings of this taskforce upheld the current philosophy of parental choice, one important recommendation was that research be carried out to ascertain the educational needs of 10-to 14-year old students. This recommendation was not adopted by the Ministry, however. One possible explanation for the Ministry's inactivity may have been its rejection of the legacy of the former Department of Education, whereby a larger organization was involved more directly in the daily lives of the nation's schools. With a much smaller Ministry of Education, more closely aligned to the policies and expectations of ministers of education, little capacity was available to undertake large-scale research projects.

In 1990 the NZISPA commissioned Massey University's Educational Research and Development Centre (ERDC) to investigate the question, "What are the needs of children in and around intermediate school years and how might their needs best be met?"<sup>22</sup> In reflecting on this commission a decade later Pat Nolan maintained that the Association "did not want to pre-empt the findings in any way," and he was under the

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21. Ministry of Education. (1990). *Report of the taskforce on form 1 and 2 education*. Wellington: Learning Media.

22. Nolan, C.J.P., Brown, M., Stewart, D., & Beane, J. (2000, September). *Middle schools for New Zealand: A direction for the future*. Paper presented at a meeting of the Post-Primary Teachers Association Conference, Wellington, pp. 3-4.

impression that “they [would have been] prepared to accept the outcomes whatever they might be.”<sup>23</sup> However, it seems reasonable to suggest that having a research team consisting of David Stewart, a retired intermediate school principal, and Pat Nolan, an ex-intermediate school teacher, would have given the Association some degree of confidence in the ERDC’s work.

The Association sought strong research evidence to support its wish to actively promote middle schooling. As Lockwood Smith’s 1991 ministerial policy stated “school communities, through their board of trustees, will be invited to negotiate the reshaping of schooling in their area.”<sup>24</sup> Accordingly, the possibility of introducing a new school structure was no longer remote. For this negotiation to be effective it had to be well-informed. To this end research data was required to enable those intermediate school boards of trustees who wished to move in this direction to try to persuade their communities of the viability of middle schools. It appeared to some middle school proponents (Sutcliffe, 1995; Thwaites, 1995) that the time was now conducive for a discussion on wider middle schooling issues to occur, particularly about the short duration of time that students spent presently at intermediate school.

## MIDDLE SCHOOL DEVELOPMENTS PRIOR TO 1992

The movement toward middle schools however, was not one merely undertaken by the national executive of the intermediate principals’ association. Moreover, it was

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23. Nolan et al. (2000, September) pp. 3-4.

24. Lee, H., & Lee, G. (1998). Middle schools or muddled schools? *Developmental Network Newsletter 1*, p. 32

clear that intermediate school authorities were not prepared to wait for the findings of the Stewart and Nolan report to be released before deciding on a course of action. A number of intermediate schools (e.g., Fergusson and Clover Park) embraced the concept of middle schools from the very early 1990s and were able to convince their local communities that this was a more effective means of educating adolescent students.

David Crickmer, principal of Bruce McLaren Intermediate School, commented that “we went to see the Ministry back in 1990-1991 and we were told that very clearly they would oppose us changing to middle school or at least capturing Form 3.”<sup>25</sup> Early discussions with Ministry officials were held with members of the former Department of Education who had been either appointed to the new Ministry or who were acting as interim officers during the reform changes. That they were not receptive to the idea of such major educational change during these early years of significant administrative reform is not surprising, given this institutional legacy.

An example of an early detailed change-of-class application, from an Auckland intermediate school, came from Fergusson Intermediate in January 1992. Its principal, Jenny Leach commented in a communication to Don Crossman that “we have submitted 27 folders containing every aspect of our middle school application to the Ministry of Education.”<sup>26</sup> Furthermore, this communication gave the impression

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25. Crickmer, D. (2002). An interview with David Crickmer: Principal of Bruce MacLaren Intermediate School. Appendix A. p.2.

26. Leach, J. (1992, January 1). Facsimile message sent by J. Leach, principal of Fergusson Intermediate, to D. Crossman, Executive member of NZISPA, p.1

that Fergusson Intermediate's application had not been the only one received by the Ministry by that date. To this end Leach wrote "the Ministry have told me it's the most comprehensive and extensive they have received to date."<sup>27</sup> The fact that the Ministry had received a number of applications from intermediate schools to become middle schools, prior to the 1993 release of the Stewart and Nolan report, indicates a wider understanding of the (American) middle school movement among some intermediate school practitioners than was assumed by Stewart and Nolan.

There were other efforts made to extend the duration of intermediate schooling beside that of Fergusson Intermediate. Since 1990, at least one other intermediate school had set up a satellite Year 9 and 10 class.<sup>28</sup> The result was that Year 9 and 10 students attended an intermediate school although they were officially enrolled at a local high school. These intermediate schools made use of a loophole in the new legislation (Sections 71 and 158 of the 1989 Education Act) which included regulations establishing special needs classes as satellite classes in host schools which had been created under the philosophy of mainstreaming. These examples suggest a degree of support for middle schools from some intermediate schools in the early-1990s prior to the publication of the Stewart and Nolan report. While some communities had supported the recapitation of their local primary schools at the expense of the neighbourhood intermediate school in the late-1980s and early-1990s, it appeared that other communities were supportive of the extension of their intermediate schools into a three-year or four-year middle school.

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27. Leach (1992, January 1) p.1.

28. Clover Park Middle School.

The difference in the manner in which the two change-of-class applications (full primary and middle school) were dealt with by the Ministry of Education, in endeavouring to fulfil the wishes of their local communities, was significant however. No middle schools had received approval from the minister throughout this period (1989-1993) although a significant number of primary schools had been approved as full primaries.<sup>29</sup> That this may have been due to a lack of intermediate schools attempting to enact such a change is refuted by the evidence outlined above.

## THE STEWART AND NOLAN REPORT

The Stewart and Nolan (1992) report, *The Emerging Adolescent*,<sup>30</sup> was well received by both the NZISPA executive and the Minister of Education, Lockwood Smith.<sup>31</sup>

The purpose of this report was to:

- (i) review the North American and United Kingdom literature on middle school education;
- (ii) summarize the research evidence in a form that may enlighten the contemporary debate; and
- (iii) draw conclusions regarding the future direction of education at the intermediate level.<sup>32</sup>

Over 60 research articles were reviewed within the report, which resulted in 8 recommendations being made by the researchers. It is noteworthy that many of their recommendations were based on the work of Watson (1964), but ignored Beeby's

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29. For example: In the preceding year "8 applications received Ministerial approval to provide form one education in contributing [primary] schools for bilingual reasons." AJHR, 1 July 1990- 30 June 1991. Statement of performance achievements. E-1, p. 70.

30. Stewart, D., & Nolan, C. J. P. (1992). *The middle school: Essential education for emerging adolescents*. Palmerston North: Massey University.

31. "The minister [Lockwood Smith] received these findings very positively." See Kerr (1996) p.16.

32. Stewart & Nolan (1992) p. i.

work in the 1930s that had covered similar ground. Stewart and Nolan's first recommendation was that:

Three-to four-year middle schools, involving the grade span from Form 1 to Form 4, be seriously considered as a more appropriate form of educational provision for 10-14 year olds than other existing structural arrangements.<sup>33</sup>

In their opinion intermediate schools could either accommodate this change in grade span or “where intermediate schools do not presently exist,” an existing secondary school might adopt the middle schooling philosophy on its site.<sup>34</sup> This suggestion, that middle schools might be established on a secondary school site, became an important aspect of the PPTA response to the report. This comment by the researchers and the PPTA’s response<sup>35</sup> reiterated a recommendation of the Currie Commission (1962) whereby the creation of Form 1 to 7 Colleges in rural areas had been endorsed. Stewart and Nolan, for their part, were aware of Watson’s advocacy of the extension of intermediate schools into rural areas.<sup>36</sup> They also knew that it had been the Currie Commission’s recommendation to establish Form 1 to 7 colleges that had been adopted by the Department of Education from the early-1960s.<sup>37</sup>

Stewart and Nolan went on to state, however, that where a secondary school adopted the middle school philosophy they should then “cater exclusively for 10-14 year

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33. Stewart & Nolan (1992), p.63.

34. Stewart & Nolan (1992), p. 63.

35. Cooney, M. (1996, November 15). Education changes need to be thought through. *New Zealand Herald*. p A13.

36. Watson (1964), pp. 418-419.

37. By the early 1990s some 23 Form 1 to 7 colleges had been established, mainly in small rural towns.

olds.”<sup>38</sup> This would mean, they observed, that “in this case older students would transfer to neighbouring secondary schools,”<sup>39</sup> a caveat that the PPTA ignored in their advocacy of a Form 1 to 7 arrangement to deal with the growth of middle schools (Cooney, 1996, 1997; Grinter, 1996). The recommendation that secondary schools in rural areas develop as new Form 1 to 4 middle schools, provided a further opportunity for the debate on which educational pedagogy middle schools should be based — primary or secondary — to occur. Historically, this debate had never been fully resolved in the New Zealand context.

While the first junior high schools of the 1920s had been staffed by both primary teachers (in the case of Kowhai Junior High School) and secondary teachers (in the case of Waitaki Junior High School), the 1922 legislation had placed such “middle schools” under the primary service. This placement was reiterated in the 1932 regulations which authorised the creation of intermediate schools. However, the earlier junior high school model had also supported the philosophy of early specialisation in secondary subjects while the intermediate model was developed on the basis of making exploratory programmes available to all pupils. The development of intermediate schools through the years 1932- 1992 had been very much within the primary teacher service. All classroom teachers in intermediate schools were members of the primary union, the NZEI. Furthermore, the tension between exploratory programmes and early specialisation occurred within the manual

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38. Stewart & Nolan (1992), p.63

39. Stewart & Nolan (1992), p.63.

department of each intermediate school. These departments were staffed by secondary trained and secondary union (PPTA) affiliated teachers.

This first recommendation of Stewart and Nolan therefore, required further clarification, which was provided by their second recommendation:

Middle schools should be independent schools, attached neither to primary nor secondary schools.<sup>40</sup>

This recommendation proposed introducing a solution for the New Zealand context directly from the American literature where the American middle school — building on the junior high school tradition — operated in an independent schooling system. This recommendation represented probably the most radical change to the existing New Zealand educational system proposed within the report. The suggestion that independence would “enable the unfettered implementation of middle school philosophy”<sup>41</sup> was a bold step in a new direction. The chief underlying criticism of intermediate schools (Beeby, 1938; Campbell, 1941; Watson, 1964) had concerned the lack of a clearly articulated intermediate school philosophy, separate from that of the primary or secondary service. The creation of a new school structure — separate from either service — would, however, create new requirements relating to resourcing and teacher training. Stewart and Nolan were alert to this situation, as revealed in their later recommendations.

The third recommendation by Stewart and Nolan stated:

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40. Stewart & Nolan (1992), p.63.

41. Stewart & Nolan (1992), p.63.

Whenever a change of school structure is contemplated in any community, the parents, students and teachers should be fully informed of the literature in regard to middle schools as an integral part of examining possible reorganization and future implications for student groups.<sup>42</sup>

In explaining this recommendation the researchers drew attention to the importance of including students as key stakeholders in any reorganization. As a group they had been overlooked in the development of schooling policy options that were articulated in *Tomorrow's Schools*. Consequently, the researchers believed that just as parents have opinions about what constitutes effective education so, too, do the students.<sup>43</sup>

Their fourth recommendation suggested that:

Programmes already exist in New Zealand for Form 1 to Form 4. Further programmes, designed according to the middle schools precepts and principles, would give curricula for this age range overall coherence and a sense of direction.<sup>44</sup>

Stewart and Nolan stated that the current two-year span of intermediate schools meant that existing curricula lacked coherence and continuity. Owing to the longer period of time spent at school by more students over 16 years that the authors' suggested "it is now desirable to lengthen the Intermediate School to capitalize on its undoubtedly potential for providing a well-balanced general education for all pupils before they embark on the special courses of a senior secondary school."<sup>45</sup> In this they paraphrased almost word-for-word Watson's ninth recommendation.<sup>46</sup> The philosophy of making a broad exploratory experience available to all students before

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42. Stewart & Nolan (1992), pp.63-64.

43. Stewart & Nolan (1992), p. 64.

44. Stewart & Nolan (1992), p. 64.

45. Stewart & Nolan (1992), p. 65.

46. Watson (1964), p. 424.

embarking on a specialized course of study at secondary school, which had been the philosophy of intermediate schools since Beeby articulated it as such in 1938, had strong appeal to Stewart and Nolan.

The following three recommendations concerned the need for teachers to undertake ongoing professional development in middle schools once they were established; the appointment of middle school principals who were university graduates, and the provision of guidance and counselling in middle schools. By these and other means the uniqueness of this new school structure, the middle school, would be ensured to grow and develop. Their eighth and final recommendation was that if middle schools were to be developed in New Zealand then:

Middle Schools should be encouraged to establish a clarity of purpose which defines their distinctive competency and use this to promote the value of middle school education in the community.<sup>47</sup>

Stewart and Nolan stated that what was lacking was clear empirical data that supported the assertion that intermediate schools or middle schools provided quality of education. To this effect they concluded “structural change, of itself simply masks any problem for a time. Schools and communities need to be clear about the likely benefits of change for learners.”<sup>48</sup> What was required, they concluded, was a strong collective philosophy to underpin the middle schools’ *raison d’être*, supported by research evidence that showed that middle schools undoubtedly enhanced learning opportunities for pupils.

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47. Stewart & Nolan (1992), p. 68.

48. Stewart & Nolan (1992), pp.72-73.

## IMPLICATIONS OF THE 1992 REPORT

After the Stewart and Nolan report was released in November 1992, the impression gained by the NZISPA was that the Minister of Education, Lockwood Smith, had received the findings of the report very positively. The Associations' executive understood that Smith had given them "a commitment that where a change to middle schools was desired and where such a change could be, initially at least, fiscally neutral, he would lend his influence to support it."<sup>49</sup> Considering that all change-of-class applications had to have the direct approval of the minister his positive response to the 1992 report was understood by the Executive to be a strong endorsement of middle schools.<sup>50</sup> While Smith accepted this report as providing sufficient evidence to begin removing the barriers to establishing three-or four-year middle schools, he believed that the need for a middle school had also to be proven to the satisfaction of the parents and community of the school. The move to middle schools was to be driven by their local communities and he was willing "to support middle schools if they were demanded by their communities and were shown to be beneficial to students."<sup>51</sup>

The "fiscally neutral" requirement referred to the Ministry of Education's policy that required all educational changes and developments to occur within the existing expenditure allocated by government to the Ministry. No new developments were

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49. Kerr (1996), p. 16.

50. This perception of the executive can be supported by a comment made by Smith in a speech delivered in 1995: "So I reiterate what I said in 1993 on the issue of middle schools, you have done enough to convince me not to oppose their establishment." See Smith, L. (1995, June 7). *Speech Notes*. Opening address of the New Zealand Intermediate School Principals' Association Conference, Wellington.

51. *Sunday Star Times*. (1996, 14 January). p. 1.

permitted if they added to the Ministry's expenditure.<sup>52</sup> Some commentators (Codd, Gordon, & Harker, 1990) saw this shift in government policy "as [being] the government's response to their inability to fund education [adequately] at a time of economic crisis."<sup>53</sup> The reality for schools seeking to increase their roll size — through a change-in-class — was that their boards had to have sufficient financial reserves to cover the costs of this development.

As John Crone, the principal of Berkley Normal Middle School in Hamilton, commented:

When we went middle school, it had to be fiscally neutral- that was one of the criteria- which stuffs a lot of schools. We already had three classrooms in place that had been paid for by a generation of students before.<sup>54</sup>

The government's pursuit of an active policy of educational efficiency was strongly in evidence throughout this phase of middle school development. Where the financial responsibility could be transferred from the Ministry to the local community it was to be encouraged, and where the cost could not be transferred then permission for a change-in-class application was withheld by the Ministry.<sup>55</sup>

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52. The application for change of class issued by the Ministry of Education contained the following clause: "Where there is not sufficient property for a change of class, the board [of trustees] must agree to meet the cost of additional resources for the first two years of the change of class." Ministry of Education (1996, October). *Application for change of class*. Wellington: Author.

53. Ward (2001), p.61.

54. Crone. J. (2002, May) Interview with John Crone: Principal of Berkley Normal Middle School, p. 15. (Appendix B).

55. In the notes to the application for a change of class, clause 17 states: "The number of changes of class proposals approved each year may have to be limited to ensure expenditure does not exceed resources budgeted by Government." See Ministry of Education (1996, October), p.7.

In 1993 the *New Zealand Curriculum Framework*<sup>56</sup> was published. This document included brief curriculum statements covering each of eight levels from New Entrant to Year 10, the end of compulsory education in New Zealand. This progression, through eight levels — known as part of providing the “seamless” approach to curriculum delivery that Lockwood Smith valued so highly — went some way to providing an alternative to recommendation four of the Stewart and Nolan report. In this recommendation they suggested the development of a curriculum specifically suited to Form 1 to 4 students. The resulting curriculum documents published after 1995, as a result of the policy outlined in the *Curriculum Framework*, would give all teachers — primary and post-primary — for the first time access to all of the levels of learning within a particular curriculum subject. Up to this time intermediate school boards intending to establish as middle schools were constrained by their primary trained staff to be able to deliver the Year 9 and 10 curriculum. However, the new curriculum documents provided primary trained teachers access to the levels of learning required in Years 9 and 10.

By 1994 there were 147 intermediate schools operating in New Zealand, only one less than at their peak of 1976. Twenty of these institutions had rolls larger than 550 students.<sup>57</sup> The “natural” roll decline of the late-1980s and early-1990s, owing to demographic changes in national population figures, was temporarily over and

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56. Ministry of Education. (1993). *The New Zealand curriculum framework*. Wellington: Learning Media.

57. Education Review Office. (1994). *Form 1 to 4: Issues for students*. National Education Evaluation Report, No. 5. Wellington: Learning Media, p. 32.

intermediate school rolls were forecast by the Ministry of Education to strengthen until 2005.<sup>58</sup>

## THE FIRST THREE MIDDLE SCHOOLS

As part of the 1989 reform of educational administration under *Tomorrow's Schools* the 1989 Education Act made provision for the setting up of Educational Development Initiatives (EDIs). The purpose of the EDI process was set out in the July 1991 National government statement, *Education Policy: Investing in people our greatest asset*,<sup>59</sup> released as part of the budget. These initiatives aimed to "improve the educational opportunities for pupils in a particular area" by having the local community, supported by Ministry officials, "reorganize the educational provisions"<sup>60</sup> available. Communities, or the Ministry of Education, could request a review of schooling involving some or all of the educational providers in an area, almost always with a view to restructuring the schools in that particular area. As the policy document explained:

There are already local initiatives underway to re-shape education provisions within districts. These include recapitation; combining intermediates and high schools to create Form 1 to 7 schools; a twin campus Form 1 to 4 school alongside a Form 5 to 7 school and amalgamation of rural primary schools.<sup>61</sup>

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58. Post-Primary Teachers' Association. (1997, May). *Meeting the challenge of growth: The emerging crisis in our secondary schools*. Wellington: PPTA, p. 16. This document stated that there were 450 000 primary enrolments in 1985, declining to a low of 420 000 enrolments in 1991, and with a projected high of 510 000 primary school enrolments in 2002.

59. Smith, L. (1991, July 30). *Education policy: Investing in people, our greatest asset*. Wellington: Government Printer.

60. Ward (2001), p. 63.

61. Smith (1991), p. 20.

Two of the first three New Zealand middle schools were established under these EDIs. During 1992 and 1993 the EDI process was applied to the schools in Whangarei City. As a result of these discussions the recommendation put by the EDI planning group that the Ministry of Education agreed:

[with] the Planning Group continuing to consult, monitor, advise and report on applications from Raumanga Intermediate School and Whangarei Intermediate School to establish Middle Schools.<sup>62</sup>

As a result of these further discussions Raumanga Intermediate was one of three intermediate schools given initial approval to open as a middle school from the first school day in 1995. Raumanga Middle School opened as a three-year middle school providing schooling for Years 7 to 9 inclusive.

The second intermediate school involved in an EDI process that resulted in the establishment of a middle school was St. Andrews Intermediate School in Hamilton (Strachan et al., 1996; Ward, 2001). The EDI issue for the local community of which St Andrews Intermediate was part concerned the lack of a secondary school for this rapidly growing northern suburb of Hamilton city. Parents were unwilling for their children to travel some distance to the nearest secondary school. As Strachan et al. (1996) have reported “after the Secondary School Steering Committee surveyed the community late in 1993, the Forms 1 to 4 option was viewed as the most viable option.”<sup>63</sup> The EDI process provided an opportunity for the proposal that St Andrews

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62. Ministry of Education. (1994). *Education development initiatives: Redesigning education at the community level*. Wellington: Learning Media, p. 35.

63. Strachan, J., McGee, C., Oliver, D., Ramsay, P., Ward, R., & Winstone, K. (1996). The establishment of a middle school: A case study of educational change. *Waikato Journal of Education*, 2, p. 27.

develop into a four-year middle school to be raised for local consideration.<sup>64</sup> Approval was given by the Minister, Lockwood Smith, for St Andrews Intermediate to translate to a four-year middle school from the beginning of 1995.

The third intermediate school to become a middle school in the mid-1990s was Clover Park Intermediate in South Auckland. Unlike the other two intermediate schools the board of trustees of Clover Park had already restructured the school along middle school lines through setting up a satellite Year 9 and 10 class attached to one of its local high schools.<sup>65</sup> In 1990 a number of Māori pupils who had graduated from Clover Park the year previous, as high achievers, chose to return. As Ann Milne, Principal of Clover Park, commented: “they’d either been suspended or were about to be, or were truanting or just fizzled out — and they had been our top kids.”<sup>66</sup> The parent community of Clover Park had used the new Parent Advocacy Council, set up under *Tomorrow’s Schools*, in an attempt to put a case to the Ministry of Education for these children to remain at Clover Park as a middle school.<sup>67</sup> While this approach to the Ministry had been ineffective the solution achieved by the school’s board of trustees was to create an attached Year 9 unit. As stated previously, the board made use of a loophole in the 1989 Education Act, which permitted the setting up of special needs units in mainstream schools. In 1991 twenty-four students were enrolled at the local high school and attended Clover Park Intermediate School as Year 9 students.<sup>68</sup>

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64. Ward, R. (2001).

65. Milne, A. (2002, May). Interview with Ann Milne, Principal Clover Park Middle School. Appendix D, p. 2.

66. Milne (2002),p. 2.

67. Milne (2202),p. 2.

68. Milne (2002), p. 3.

During the period 1991-1994 however, the principal had attempted to negotiate a different solution to this issue with her local Ministry office. Then in April 1994, a staff member from the Auckland office of the Ministry of Education suggested to Milne to submit an application for a change-of-class to become a middle school. She was contacted on the Friday and given only one weekend in which to prepare her application.<sup>69</sup> However, the Minister of Education, Lockwood Smith, approved the change of class for Clover Park Intermediate School, three months later, in July 1994. While this approval was unexpected by Milne, many of the local secondary school principals believed that “I’d deliberately gone behind their backs to get a middle school established.”<sup>70</sup> These principals, she believed, saw the new middle school as representing a “threat to their falling rolls.”<sup>71</sup>

With reference to the motivation for Clover Park to move to a middle school structure Milne remarked that while “we were pushed into it” by parents and the Ministry, she believed that “we were definitely coming from a philosophical base — the more we realised, well, there was such a match with what we’d been trying to do that that was the logical way to go.”<sup>72</sup> Many of the pedagogical processes typical of middle schooling — examined further in chapter 4 — Milne believed, mirrored the work the school had undertaken previously with their high achieving Māori students.<sup>73</sup>

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69. Milne (2002), pp. 3-4.

70. Milne (2002), p.4

71. Milne (2002), p. 4.

72. Milne (2002), p. 4.

73. Milne (2002), p. 2.

Of a total of eight intermediate schools that had applied to become middle schools in 1994, only three received approval from Lockwood Smith. It is noteworthy that one unsuccessful application had been received from a secondary school “seeking to cover students in the F1-4 group.”<sup>74</sup>

### SOME POLITICAL ISSUES FACING MIDDLE SCHOOLS

In 1994 the NZEI published a new policy on middle schools.<sup>75</sup> Of particular concern to the NZEI executive was the desire “to avoid the invidious situation of teachers working on the same site, teaching the same students but who have different salaries and conditions of employment.”<sup>76</sup> In the mid-1990s, middle schools — spanning both the primary and secondary teaching services — created a series of unique staffing and resourcing difficulties. In 1994 separate pay scales existed for the two services. For the NZEI, middle schools provided a significant bargaining tool when approaching the government in the mid-1990s to lobby for pay parity between the primary and secondary services on grounds of equity.

In a speech to the NZISPA Conference in June 1995 Lockwood Smith reiterated his ongoing support for middle schools. The changes to the staffing of schools that he had introduced that year, Smith believed, would support the creation of more middle schools. The result of these staffing changes for middle schools was to secure specialist teacher ratios for the delivery of Technology subjects. Smith also stated that

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74. New Zealand Educational Institute. (1994). *NZEI policy on middle schools: Branch circular 1994/46*. Wellington: Author, p. 4.

75. New Zealand Educational Institute. (1994). *NZEI policy on middle schools: Branch circular 1994/46*. Wellington: Author.

76. New Zealand Education Institute (1994), p. 8.

the Ministry of Education had estimated that \$500 million would need to be spent on school property to accommodate projected roll growth to the year 2005. This money would support the development of new innovations in New Zealand education, Smith observed. He concluded by noting that if some of this additional funding “wasn’t spent on at least one new middle school I’ll also be disappointed.”<sup>77</sup>

With the opening of the first three middle schools in 1995 the NZISPA appeared to be having a watershed year. Not surprisingly, therefore, the Association’s executive chose to produce a number of brochures<sup>78</sup> promoting the new type of institution for parent and community information. This was followed in 1996 by the publication of, *A Strategic Plan of the New Zealand Intermediate and Middle Schools Association*. In this plan the purpose of the newly renamed New Zealand Intermediate and Middle Schools’ Association was stated explicitly. It was to “promote the development and growth of middle level education as a distinct entity between primary and secondary schooling in the education structure.”<sup>79</sup>

The change of the Association’s name was significant for two reasons. The first was the inclusion of the word “middle” in the title thereby ensuring the continuation of the intermediate school heritage alongside the new middle school development. Both types of institution came under the association’s auspices. Perhaps this is not surprising given that the first three middle schools were originally intermediate

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77. Smith, L. (1995, June 7). Speech delivered to the NZISPA annual conference, Wellington.

78. These brochures included: *Making the most of the middle years* (1995) and *Middle schools: Helping to master the “middle” years*. (1996) both published by the NZIMSA.

79. New Zealand Intermediate and Middle Schools’ Association. (1996). *A strategic plan of the New Zealand intermediate and middle schools association*. Wellington: Author, p. 3.

schools and their principals had pursued careers in the primary service. The second change was the removal of the word “principal” from the title. This was the first step towards creating open membership criteria, itself a prerequisite for membership of the National Middle School Association of America (NMSA).<sup>80</sup> Although open membership was not achieved until the NZIMSA annual general meeting held in Christchurch in 2000<sup>81</sup> this debate over open membership was held annually from 1996.

In June 1996 a joint Ministry of Education and NZIMSA statement was delivered to the new Minister of Education, Wyatt Creech, in which five of the key recommendations of the Stewart and Nolan report were selected as possible ingredients for a new educational policy on middle schools.<sup>82</sup> This joint statement requested legislative recognition of “middle schools” instead of simply classifying them as composite schools. Furthermore, its authors asked that government should explicitly develop, fund and publicise middle schools as the most developmentally appropriate schooling arrangement for emerging adolescents. The statement went on to ask that the particular resourcing needs of middle schools be recognised, that training colleges be encouraged to provide education on middle schools and that the staffing anomalies in middle schools be addressed.<sup>83</sup> Little came of the statement as the National government was preparing for a general election later in 1996. This

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80. New Zealand Intermediate and Middle Schools’ Association. (1996). *Minutes of annual general meeting*. Queenstown: Author.

81. New Zealand Intermediate and Middle Schools’ Association. (2000). *Minutes of annual general meeting*. Christchurch: Author.

82. New Zealand Intermediate and Middle Schools’ Association. (1996, May 24). *Letter to the Minister of Education: Middle schools, current issues*. Wellington: Author.

83. New Zealand Intermediate and Middle Schools’ Association (1996, May 24).

election resulted in the formation of a coalition government between National and New Zealand First parties. This coalition government was to significantly change the relationship that had existed up to this point between the middle school movement and the national Ministry of Education.

The New Zealand First spokesperson on Education, Brian Donnelly had been principal of Whangarei Intermediate School prior to his election to parliament. He had been involved with the EDI that had seen the creation of Raumanga Middle School. Perhaps not surprisingly, then, the coalition agreement between New Zealand First and the National Party contained a clear statement about the removal of barriers to the creation of middle schools:

The government will support the development of middle schools for communities wishing this form of schooling structure by removing obstacles to such developments.<sup>84</sup>

For the supporters of the middle school model it would have appeared that by the end of 1996 the creation of new middle schools would be assured. With what these supporters perceived to be as strong pedagogical support from the Stewart and Nolan report and political support from the new coalition government, there seemed ample reason to assume that the creation of new middle schools would be delayed no longer. However, that was not to be the case.

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84. Peters, W. (1996, December 5). Key initiatives of policy: Coalition statement 3. Policy: Education.

## THE POST-PRIMARY TEACHERS' ASSOCIATION AND MIDDLE SCHOOLS

One of the most vocal critics of the middle school movement of the mid-1990s was Martin Cooney, President of the Post-Primary Teachers' Association (PPTA). While Cooney also saw the election of the coalition government "as [being] an historic point where there is a real potential to transform our schooling system,"<sup>85</sup> he did not envisage that change to be at the expense of secondary school teachers. The PPTA had watched the development of the first middle schools with a degree of caution, and were unhappy with what they believed amounted to a threat to secondary school enrolments. As Cooney remarked "the structure of any school system is an historical accident — a compromise between administrative convenience and educational theory."<sup>86</sup>

The PPTA's arguments in opposition to the development of middle schools, as articulated by Cooney in the public forum, were on four main policy points; opposition to the political compromise reached between the two coalition parties, the perceived falling rolls of intermediate schools, a belief that a Form 1 to 7 structure would be more effective than the middle school option and a perception that the present government anticipated that middle schools would be a "cheap" means of providing schooling to Year 9 and 10 students. Each of these four points will be discussed in turn.

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85. Cooney, M. (1996, October 17). *Address by Post-Primary Teachers' Association president to the national executive of the association of intermediate and middle school principals*. Wellington, p.1.

86. Cooney, M. (1996, November 15). Education changes need to be thought through. *New Zealand Herald* p.A. 13.

The first of Cooney's arguments was that this new educational structure — the middle school — had been introduced as a political compromise between the coalition government parties, with no serious consideration given to its educational philosophy. While the PPTA were willing to quote from the work of Stewart and Nolan,<sup>87</sup> they were unwilling to accept this report as providing a research basis for middle schools. The policy of the coalition government, in the PPTA's opinion, carried far too much weight in securing this educational change. As Cooney commented "unfortunately, the pressures for and against change are driven as much by politics as they are by educational criteria."<sup>88</sup>

This argument was not without merit. As Lee and Lee (1999)<sup>89</sup> suggested there were a number of disagreements over key tenets of middle schools and middle schooling amongst middle school advocates (Kerr, 1996; Hinchco, 1996; NZIMSA, 1996). Differences in opinion arose over; the ideal grade-span for middle schools, the length of time pupils should stay at middle schools, the differences between junior high school and middle school philosophies and early specialization or exploratory programmes, to mention just four areas of dissent. The result of this dissent has been that the development of a single New Zealand middle school philosophy — as will be discussed in chapter 5 — has been problematic. Without a clear middle school philosophy the PPTA made much of the direct political involvement of the New

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87. With reference to the Stewart and Nolan report, Recommendation one — "that middle schools could be set up in secondary schools," — was frequently quoted by PPTA spokespeople.

88. Cooney, M. (1996, November 15) *New Zealand Herald* p. A13

89. Lee, G., & Lee, H. (1999). The contested middle ground: Middle schools in New Zealand. *New Zealand Journal of Educational Studies*, 34, pp.211-221.

Zealand First party in the establishment of middle schools during the period 1995-1997.

The PPTA, for their part, declared that the establishment of middle schools had occurred as a reaction by intermediate schools to falling rolls. Cooney argued:

Unfortunately the pressure for separate middle schools so far has come from the effects of falling rolls in a competitive situation. This is a highly inappropriate way to develop major educational policy.<sup>90</sup>

In the Association's opinion, after a period of falling rolls and recapitation by primary schools — during the late-1980s and early-1990s — the middle school movement was increasingly seen by intermediate school boards of trustees as an ideal means to address roll decline. This reversal could occur, the PPTA argued, only at the expense of secondary school enrolments.

However, while there had been a period of falling rolls this trend had, by 1996, been reversed with steady roll growth in both the primary and intermediate school sectors.<sup>91</sup> The use of the 1989 Education Act by primary schools to undertake recapitation had affected a number of intermediate schools, particularly those in communities who were also facing a natural population decline. Was it correct, then, to claim — as the PPTA had — that this had been a motivation for the creation of middle schools?

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90. Cooney, M. (1996, November 15). *New Zealand Herald*, p.A13.

91. See footnote 58 for the PPTA's own statistics on the enrolment rise among primary school enrolments.

In investigating each of the first three middle schools roll decline does not appear to be an immediate or particularly relevant factor. In the case studies of Raumanga Middle School and St Andrews Middle School their status was attributed to EDIs supported by Ministry officials in the hope that the “[new]schools would be able to deliver a more appropriate education for the children in their community.”<sup>92</sup> For these two schools the wider issues of providing better education for their communities were those argued by the Ministry not those based on school rolls. Establishing St. Andrew’s Middle School, for example, provided a means for the Ministry to expand the school to fit its existing site in preference to building another secondary school within Hamilton city. While this was seen as an issue for the PPTA it was not one of roll growth contrary to assertions in the press.

The case of Clover Park Middle School students entering Year 9 and 10 classes were those who were already enrolled in the school. As Milne commented “at the time that we became a middle school, [in 1995], when we started talking about keeping the third and fourth formers, we had the highest roll that the school’s ever had.”<sup>93</sup> Again, in this case study this was a local PPTA issue, not one concerned with roll decline across the community. In two of the three first middle schools it would appear that the resulting roll decline of the local high school was more relevant than was the roll of the intermediate school. However, the claim that intermediate rolls were decreasing remained prevalent among secondary schools’ spokespeople opposing middle schools in their areas (Grinter, 1997; Tait, 1996).

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92. Strachan, et al. (1996), p. 25.

93. Milne (2002, May), p. 8.

Ironically, secondary school authorities were experiencing their largest roll increases for some decades as the growth experienced by the primary sector moved through to the secondary schools from 2000.<sup>94</sup> As the Education Review Office commented in 2000; “The pressure to establish middle schools is being resisted by those within secondary schools who see the middle school movement partly as an attempt to compete for Year 9 and 10 students.”<sup>95</sup> It was this argument — about competition for Year 9 and 10 students — that was confused in the national press with the PPTA’s assertion that intermediate schools were facing declining rolls. The claim then, that establishing middle schools was an answer to declining rolls in intermediate schools does not appear to be supported by the evidence. While it is true intermediate schools were to face roll decline again in the early-2000s this situation was somewhat distant from the discussions of the mid -1990s.

#### ALTERNATIVE PROPOSALS FROM THE PPTA

The third argument tendered in opposition to the creation of middle schools by the PPTA was that if there was to be a change in school structure then it should be to a Form 1 to 7 college structure as suggested by the Currie Commission in 1962. Spokespeople for the PPTA (Cooney 1996; Grinter, 1997; Tait, 1996) quoted the rural Form 1 to 7 movement — established after 1962 — as an effective model, in their opinion, on which to base a new school structure. They also referred to the Stewart and Nolan report when they suggested that in certain communities secondary schools might consider restructuring into Form 1 to 4 schools. These spokespeople did not

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94. The figures stated by the PPTA in footnote 58 were given to explain the bulge of student numbers high schools could anticipate enrolling from 2005 onwards.

95. Education Review Office. (2001). *Students in years 7 and 8*. Wellington: Learning Media, p. 10.

refer, however, to the next statement in the report which recommended that “in this case older students would transfer to neighbouring secondary schools.”<sup>96</sup> The implication of this Stewart and Nolan recommendation, that senior secondary schools be set up to cater for the senior students of a number of rural middle schools, was not referred to by these spokespeople for the PPTA.

The PPTA’s proposal suggested that middle schools could be established in two ways. First, a middle department might be created within existing secondary schools, so that students in this department would have the opportunity to spend part of their day “in a “homeroom” [and] they would have increasing access to specialist teaching along with the specialist equipment and rooms necessary.”<sup>97</sup> A second alternative suggested by the PPTA was that “there may need to be some separately sited but closely connected middle and senior colleges.”<sup>98</sup> The first suggestion was similar to the junior high model of the 1920s, such as that set up at Waitaki. The second built on the suggestion of the Watson report that suggested that intermediate schools be built adjacent to secondary schools.<sup>99</sup> The PPTA expanded upon these two arguments in their publication, *The Shape of Schooling* (1997), to include an appeal to the notion of educational efficiency. Predictably, perhaps “efficiency” was seen as both fiscal and institutional. The PPTA did not think “it reasonable to expect the taxpayer to fund a

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96. Stewart & Nolan (1992), p. 63.

97. Cooney (1996, October 17), p.5.

98. Cooney (1996, October 17), p.5.

99. Watson (1964), p. 420. Recommendation 7.

duplication of facilities in middle schools, particularly in the absence of any evidence that they offer any educational advantage.”<sup>100</sup>

As with the early development of intermediate schools the PPTA was concerned that new (in this instance, middle) school facilities would duplicate those already available in nearby secondary schools. While this was certainly possible the creation of new resources in intermediate schools being established as middle schools — as mentioned earlier within the context of Ministry policy — had to be “fiscally neutral.” In other words school authorities were expected to cover the costs involved in establishing middle schools from their own budget.

Initially, this argument about the restructuring of secondary schools to better cater for middle school aged students appeared to be a direct reaction to the intermediate school “drive” to create middle schools and the subsequent competition for Year 7 and 8 students. However, much of what Cooney and other PPTA spokespeople were suggesting were based more on the New Zealand junior high model of the 1920s. The PPTA referred in earlier press releases to the junior high school model of the 1920s as having established these schools with secondary school staffing.<sup>101</sup> Of the ten junior high schools created in the early-1930s nine had been attached to other institutions; six to a secondary school, one to a technical high school, one to a district

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100. Post-Primary Teachers’ Association. (1997). *The shape of schooling: Information and advice for members affected by school restructuring initiatives*. Wellington: Author, p. 4.

101. Cooney (1996, November 15), p. A13. “In the 1920s intermediate schools were set up as a system of three-year junior high schools staffed originally by specialist (secondary) teachers.”

high school, and one to a primary school. Only one had been established as a stand-alone institution.<sup>102</sup>

Therefore, intermediate school supporters looked to the Kowhai Junior High School model staffed by primary teachers for support of their middle school model. Conversely, the PPTA referred to those junior high schools that had been attached to secondary schools, and staffed with secondary teachers. While it was incorrect to assert that the establishment of intermediate schools within the primary service was an “accident”,<sup>103</sup> the debate over whether middle schools should encourage *early specialization*, rather than the more prevalent intermediate philosophy of *exploration*, had not been resolved in the public arena by the early-to-mid 1990s, although it had been frequently aired.<sup>104</sup>

The PPTA argued for the introduction of early specialization in secondary subjects for Year 7 and 8 pupils, in keeping with their stance that secondary trained teachers should staff Form 1 to 7 colleges and teach at all levels. Moreover, the Association claimed that early specialisation was the norm in many countries, beginning at the age of eleven.<sup>105</sup> In short, debate persisted over the aims of middle schools in New Zealand until at least the mid-1990s.

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102. Watson (1964), p.55.

103. Editorial. (1996, October 29). Accidental Schools. *The New Zealand Herald*. p. A12.

104. Beeby (1938), Currie (1962), Watson (1964), Lee & Lee (2000).

105. Cooney (1996, November 15) p. A13. “Internationally that is the more commonly accepted age (eleven years) when specialist teaching, particularly for subjects such as languages, should begin in earnest.”

On behalf of the PPTA, Cooney argued that if middle schools were to develop as institutions providing early specialisation then they should be staffed by secondary school teachers. It was this very point, conflict over who should staff these institutions, which Stewart and Nolan had attempted to address in their second recommendation. They suggested that middle schools be stand-alone institutions, reliant neither on primary nor secondary school traditions. This suggestion, not surprisingly, challenged conventional ideas about staffing institutions. Their report suggested that it was timely for teacher training colleges to consider, as had been suggested by Watson in 1964, programmes specifically designed to prepare teachers for working in middle schools. The PPTA's case for secondary trained teachers was not furthered with the publication of the 2001 Education Review Office (ERO) Report, *Students in Years 7 and 8*. ERO concluded that while New Zealand Form 1 to 7 schools did provide junior students with access to specialist teachers the "issue of concern in many of these schools is the quality of student support."<sup>106</sup>

The fourth argument the PPTA presented against the creation of middle schools concerned their belief that middle schools were being established in low socioeconomic areas. This situation, the Association stated, suited the government because the policies of *Tomorrow's Schools* appeared to the PPTA to be supporting the under-funding of education. Middle schools, the PPTA suggested, were merely a "cheap" means to provide schooling to Year 9 and 10 students:

Judging from the fact that the middle schools in existence have appeared in poor areas it is clear that an invidious de facto segregation of education is occurring. The children of the wealthy

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106. Education Review Office (2001) p. 50.

are attending [Form] 1 – 7 schools (usually private) so they gain all the benefits of that early specialisation can bring while poorer children are effectively being retained in primary school until year 10.<sup>107</sup>

This statement does not refer to the small Form 1 to 7 colleges in rural areas mentioned previously<sup>108</sup> but, rather, to the large private Form 1 to 7 colleges in urban communities. The assumption the PPTA made was that students attending these private colleges received specialized tuition in and beyond the junior forms presumably from teachers trained in the secondary service. However, in outlining this suggestion, the Association ignored the fact that the appointment of *primary-trained* teachers (to create homeroom classrooms for Year 9 and 10 students) had long been a reality for those private colleges who could afford to finance such classes.

The first three New Zealand middle schools represented a range of socioeconomic gradings<sup>109</sup> as classified by the Ministry of Education, although they had not been dependant on that rating to gain middle school status. In 1997, Richard Ward notes, “over 20 applications [were] to be made by intermediate school boards of trustees to the Ministry of Education for permission to establish middle schools.”<sup>110</sup> Not all of these 20 applications were successful, but together they covered the full range of socioeconomic decile ratings for intermediate schools. One of the successful intermediate schools seeking middle school status in 1997, Berkley Intermediate in

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107. Post Primary Teachers Association (1997), p. 7.

108. See p. 118.

109. Raumanga Middle School and Clover Park Middle School were designated as Decile 1 while St. Andrews Middle School received a Decile 6 rating. The decile system was introduced with a view to socio economically grading each school according to a range of criteria including the income of households of students attending school, the ethnic mix of those households and the level of tertiary education of the adults in these households as determined by census information.

110. Ward (2001), p. 65.

Hamilton, was a decile 9 school. With this steady increase in applications seeking a change-in-class by intermediate schools PPTA opposition also increased. The ERO report suggested that secondary schools had felt threatened by the middle school movement. Secondary schools had not been sufficiently aware of the particular needs of their Year 9 and 10 students, and the ERO report noted:

The focus of many secondary schools and of government policies for these schools is the education of senior students. Important issues for secondary schools are how to bridge the gap between years 8 and 9 and how to ensure that year 9 and 10 students are consistently challenged and extended.<sup>111</sup>

#### MIDDLE SCHOOLS IN THE LATE 1990s

The first three middle schools (established in 1995) were joined by another four in 1997; Tweedsmuir Junior High in Invercargill, Sunset Junior High in Rotorua and Berkley Middle School in Hamilton. The fourth — Southern Cross Middle School — was established as part of an EDI undertaken in South Auckland. This middle school was part of a new initiative to create a seamless New Entrant to Form 7 campus on one site, whereby three separate schools would embrace all of the compulsory years of schooling.

The use of the title “junior high school” title in two of the second generation of middle schools added a degree of confusion to the middle school movement. In the example of Tweedsmuir the Principal, Alan Dennis, commented that “we are called Tweedsmuir Junior High because there was already an Invercargill Middle School in

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111. Education Review Office (2001), p.51.

the centre of town, otherwise we would be Tweedsmuir Middle School.”<sup>112</sup> Therefore the intention was for that school to operate on a middle school philosophy — one which is investigated further in chapter 5 — while being called a junior high school. The case of Sunset Junior High was different however, as is shown in the case study examined in chapter 7. Furthermore, three of the four middle schools were four-year institutions. Only Berkley Middle School adopted a three-year structure.<sup>113</sup>

After the collapse of the coalition government in late 1997<sup>114</sup> only one other intermediate school was established as a middle school. In 1998 Cambridge Middle School was created as the eighth New Zealand state middle school. The political importance of the National-New Zealand First coalition government in directly supporting the pedagogical beliefs of the NZIMSA is evidenced in the fact that no new state middle schools have been created since 1998. Yet this did not mean that the idea of establishing middle schools lacked appeal. In this connection it is noteworthy that, while there has been a hiatus in developing state middle schools post-1998, a number of private schools have chosen to pursue this arrangement. In 1997 the Senior College of New Zealand — situated in Auckland — announced the creation of a Junior College in the following terms. It was “[to cater] for students in Form 1-4. [The] Junior College will open at a Parnell campus in February 1998 with Forms 1, 2 and 3

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112. Dennis, A. (2002) An interview with Alan Dennis: principal of Tweedsmuir Junior High school. Appendix C, p. 5.

113. Crone (2002, May), p.7.

114. With the breakdown in relations between the two coalition parties and the effective withdrawal of the New Zealand First Party, the political support of middle schools from Brian Donnelly, Associate Minister of Education was less effective from this time. This issue of political support for middle schools is examined in more depth in Chapter 7.

with Form 4 to be added in 1999.”<sup>115</sup> Similarly a private college, Kristin School, established a separate middle school on their New Entrant to Form 7 school campus during 1998.<sup>116</sup>

In December 2002 Christine Fernyough, an Auckland philanthropist and educationist — renowned for her work with the “Books in Homes” scheme and the “Gifted Children’s” programme — announced that she wished to establish “a state funded, fulltime Gifted Kids Junior High School (Year seven to 10).”<sup>117</sup> Later, in December 2002, an unrelated advertisement appeared in the *Sunday Star Times* seeking enrolments in New Zealand’s first privately run, stand-alone middle school, Mt Hobson Middle School in Auckland.<sup>118</sup>

Both these state and private school case studies include examples of stand-alone institutions and school-within-a-school structures. Nolan and Brown (2002) have commented that:

The Ministry of Education has predicted that the “middle school-within-a-school” pattern is likely to proliferate perhaps more readily than the stand-alone pattern, for cost saving and political reasons as well as educational reasons.<sup>119</sup>

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115. Advertisement. (1998, January 8). Reaching for the stars. *New Zealand Herald*, p. A11.

116. Kristin school is an independent, co-educational non-denominational school from Kindergarten to Year 13 and has three schools on one campus including a middle school covering year 7-10.

*Excellence: New Zealand education directory 2002*. Auckland : Snedden & Cervin Publishing, p.111

117. Schmidt, V. (2002, December). School for stars. *Metro*, 258, p. 82. See also Gifted kids junior high. *Eduvac*. (2002, August 12), p.1.

118. Mt Hobson Middle school opening for years 7 to 10. (2002, November 24). *Sunday Star Times*, p. E13.

119. Nolan, C.J.P., & Brown, M. (2002). The fight for middle school education in New Zealand. *Middle School Journal*, 33 (4), p. 39.

This is an important comment in light of the current policy of educational efficiency driving many educational developments within New Zealand. However, the election of the Labour-Alliance coalition government in 1999 continued the National minority government's programme where no new state middle schools were established. The Ministry's prediction appeared to be of greater relevance to private schools than state schools at this time. Subsequently, of the eight middle schools that were created one — Raumanga Middle School — underwent further restructuring and operates now as a full primary school. Of the remaining seven state middle schools one other is at risk of closing owing to declining roll numbers.<sup>120</sup>

More recently, in 2003 the development of middle schools has taken a new direction with the announcement by the Minister of Education, Trevor Mallard, suggesting a review of secondary education was to be undertaken. As the PPTA general secretary, Bronwyn Cross, commented:

The Education Minister has told us that a review could have implications for school structures. This could well mean a move to set up middle (Year 7-10) and senior (Year 11-13) schools.<sup>121</sup>

After almost 80 years of middle school structures being placed within the primary service in New Zealand, one wonders if it is the Minister's intention to place this school structure in a post-primary setting as first envisaged by Milner, Parr, and the minority vote in the 1922 Conference on Post-Primary Education.<sup>122</sup>

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120. Sunset Junior High.

121. Post-Primary Teachers Association (2003, March). School structures: F1-7 the ideal. *PPTA News*, 24 (2), p.5.

122. See Milner (1983), pp.165-166.

On the 8 September 2003 Mallard announced the building of a new junior high school in Albany, North Auckland. This junior secondary school, to be opened in 2005, will cater for students in years 7-10 and will provide a “new and different approach to the provision of education in the Albany area.”<sup>123</sup> Appleby Road Junior High School is being established to meet the rapid growth in school aged population occurring in this area of Auckland. Students who graduate from this institution will “be catered for at a new senior high school, which will also be established in Albany.”<sup>124</sup> This senior high school is being designed in consultation with Massey University, Albany.

## THE NZIMSA AND MIDDLE SCHOOLS

From the mid-1990s the expansion of middle schooling for the NZIMSA consisted of three main aspects. First, there was greater contact between the Executive of the NZIMSA and the National Middle Schools’ Association (NMSA) in America. As outlined previously Doug Thwaites, President of the NZISPA in 1990, had spent time in the United States of America teaching in a middle school as part of a Fullbright-Hayes Fellowship. In 1995 the NZISPA paid for the current president, John Sutcliffe, to visit America and to study, “the design and layout of new middle schools.”<sup>125</sup> One year later three NZIMSA members travelled to the NMSA Conference in Baltimore

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123. Mallard, T. (2003, September 8). *Innovative new schooling for Albany students*. Ministerial press release. Wellington.

124. Mallard, T. (2003, September 8).

125. Sutcliffe, J. (1995, December). *Interim report to the NZIMSA national executive on the design and layout of new middle schools in USA*. New Plymouth: Author.

USA.<sup>126</sup> These overseas visits by intermediate school principals have occurred each year since 1996.

As well, the National president of the NMSA, Marion Payne, attended the New Zealand NZIMSA Conference in 1996, at which she offered three principals the opportunity to travel to America to take up principal positions of American middle schools.<sup>127</sup> Visits to America between 1996 and 1998 laid a path for some 20 principals and middle level educators to travel to the NMSA international conference in 1999 where two presented papers.<sup>128</sup> During the late-1990s and early-2000s at least three New Zealand middle school supporters have had articles published in American middle school journals.<sup>129</sup> This contact with a specialised area of the American educational community has continued to provide opportunities for policy importation to occur regarding middle level education.

Second, while the NZIMSA executive continued to lobby for the ongoing establishment of middle schools they also began to articulate the concept of delivering middle school pedagogy within existing intermediate schools. An attempt was made by the Executive of the NZIMSA post-1998 to widen the middle school debate to include more transparently intermediate schools. In the late-1990s the latter

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126. The three were John Crone, Principal of Berkley Normal Intermediate School, Hamilton the year prior to it translating to a middle school, on his second visit to the states; Jonathan Tredray, Principal of Peachgrove Intermediate, Hamilton and Brian Hinchco, associate principal of Kaitao Intermediate School, Rotorua.

127. Mooar, G. (2003, March 9). Speech delivered to the Bay of Plenty Association of Intermediate and Middle Schools Conference. In all only one New Zealand principal, Geoff Mooar, former Principal of Maeroa Intermediate, took up this opportunity.

128. Neville-Tisdall, M. (2002). Pedagogy and Politics in New Zealand's Middle Schools. *Middle School Journal*, 33 (4), p. 47. Papers were presented by Mollie Neville and Pat Nolan.

129. Hinchco (1997); Neville-Tisdall (2002); Nolan & Brown, (2002).

institutions still represented the largest percentage of NZIMSA membership.<sup>130</sup> In 2003 the annual conference endorsed the publication of a new promotional booklet, which clearly repositioned the association so that intermediate schools were part of the middle school structure for New Zealand.

Third, a number of conferences were called under the auspices of the NZIMSA from the late-1990s. The inaugural middle school seminar held in Wellington in 1997 was followed by the “Meeting of the Middle School Minds Conference” in Auckland in 2000. Two years later the Auckland Intermediate and Middle Schools’ Association held a middle schools “teacher-only-day,” for 500 intermediate and middle school teachers. Such a groundswell of support from teachers, certainly among the NZIMSA membership, made it possible for the philosophy of middle schooling to be actively promoted to a receptive audience.

## CONCLUSION

While the establishment of state-funded middle schools slowed with the election of the Labour-Alliance coalition government in 1999, the proliferation of private middle schools continues. However, a number of key concerns articulated by educational commentators of the late-1990s remained unaddressed. For example, in a series of articles in 1998 and 1999, Lee and Lee outlined three major educational issues that they considered needed clarification before middle schools could receive broader

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130. In 2002 NZIMSA membership consisted of 130 intermediate schools, 7 middle schools (including junior high schools), and only one non-school membership.

endorsement. First, the often-quoted claim by middle school proponents that “middle schools promote adolescence as a stage in human development that is of such importance that it should be catered for entirely within separate three-or four-year schools,”<sup>131</sup> requires further analysis. The argument that emerging adolescents are (and should be seen as) an identifiable group is examined further in chapter 3.

Second, Lee and Lee stated that owing to a variety of middle school philosophies in existence within the New Zealand educational community, confusion arose over what was the most desirable age-span for these schools to embrace. In particular, there was uncertainty about endorsing either the model of early specialization central to the junior high school or the exploratory model of the middle school reform movement adopted by the United States of America.<sup>132</sup> This issue is discussed in greater depth in chapter 4.

The third point that Lee and Lee made was that a relationship must remain at whatever point of contact there is between students transferring from the middle school to the secondary school system. In specific terms, further discussion needed to be held over what point in the current system should School Certificate, or its successor (Level 1 of NCEA), be located. This issue is investigated further in chapter 4, where intermediate and middle school principals’ comment on matters related to the creation of middle schools.

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131. Lee, H., & Lee, G. (1998). Middle schools or muddled schools? *Developmental Network Newsletter 1*, p. 29.

132. Lee, G., & Lee, H. (1999). The contested middle ground: Middle schools in New Zealand. *New Zealand Journal of Educational Studies*, 34, pp.211-221.

For their part, Nolan and Brown stated:

A great many secondary teachers around the country with whom we work persistently say, “We know that we are not doing the right thing with these students (in the middle years), despite our best efforts. We do not know how to work any better with them and we are locked onto systems and forms of school organisation which do not allow us to work differently or better.”<sup>133</sup>

The result, they claimed, was that “the desirability of creating three-or four-year middle schools in New Zealand is likely, of course, to remain contested and possibly resisted too.”<sup>134</sup>

This chapter has described the development of the first eight New Zealand middle schools during the 1990s. In so doing it has investigated two key themes of this thesis. The first theme is that the development of new structures of schooling has occurred in response to a perceived desire for greater educational efficiency. The supporters of middle schools believe this structure of schooling can meet the educational needs of the pupils enrolled in them more effectively. According to the Ministry of Education, new developments could occur only within strict financial guidelines on the grounds of efficient use of the resources the Ministry had access to. Nevertheless, in the mid-1990s one political party, New Zealand First, considered the development of middle schools as an educational priority, subject to community support for their establishment.

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133. Nolan, C. J. P., & Brown, M. (2001, November). Educating students in the middle: Directions for secondary schools, *The Journal of the Secondary Principals' Association of New Zealand*, p. 9.

134. Nolan, et al.(2001) p. 9.

The second theme developed in this chapter has been the PPTA's resistance and criticism of middle schools per se. Their support of Form 1 to 7 colleges, following on from the recommendations of the Currie Commission (1962) was placed in direct competition to the middle school proposal of Form 1 to 4 stand-alone institutions. While the PPTA considered stand-alone middle schools undesirable they were willing to consider middle school departments on secondary school sites. This difference in what constitutes "efficient educational provision" is central to the debate over what is the best (or better) school structure for this age-group of students.

Chapter 3 will discuss the concept of the "emerging adolescent" and in particular the specific needs of this age-group as these are identified and defined from three perspectives. The first is the biological, the second psychological and the third the sociological perspective. Can a specific developmental stage be identified and labelled that of the "emerging adolescent"?

## **Chapter Three**

### **Emerging Adolescence**

#### **INTRODUCTION**

During the mid-1990s and early-2000s the creation of a new structure of schools called “middle school” or “junior high school” in New Zealand was based on the presupposition that a specific institutional structure was best suited to the provision of schooling for students labelled “emerging adolescents.” If such a definable group does not exist then one of the key premises expounded by middle school proponents for age-appropriate schools also ceases to exist. Before any further investigation of middle schools can be undertaken, then, it is important to address this fundamental research question: Is there an identifiable cohort of students associated with the term “emerging adolescence”?

This chapter has approached defining the term “emerging adolescent” from four perspectives. The first is that of the biological approach, the research concerned with the physiological changes and development that occurs around the 10- to 14 year age-span. The second is from the psychological aspect, including an investigation of the cognitive, psychological and emotional developments that occur at this stage in human development. The third considers the impact of sociological influences on human development, particularly the role played by various social constructs, such as schools. The fourth perspective is from that of current New Zealand middle school principals and the reasons they express to define this particular stage of human development as one of “emerging

adolescence.”<sup>1</sup> The first three of these four perspectives have been examined through a review of research literature. The fourth was examined through interviews of five New Zealand intermediate and middle school principals.

Lee and Lee — in an article published in 1998 — reported that middle school proponents claimed “middle schools promote adolescence as a stage in human development that is of such importance that it should be catered for entirely within separate three- and four-year schools.”<sup>2</sup> This statement suggested three key questions for further research. First, were middle school supporters making such statements? Second, is there evidence to support such a distinction in the stages of human development as “emerging adolescence”? Third are emerging adolescents best catered for “entirely” within separate stand-alone middle schools in the New Zealand educational environment?

This chapter will address the first two of these research questions. The third — that middle schools may in some way be the most ideal school structure to educate this group — will be examined in chapter 4.<sup>3</sup> Within the present chapter another important aspect of the term “emerging adolescence” that of “needs,” will also be discussed. This analysis is necessary because frequent reference had been (and is) made to the “needs of emerging adolescents”<sup>4</sup> in pro-middle school literature.

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1. It will be recalled that following the historical research covered in chapters 2 and 3, evidence was found of earlier references to the term “emerging adolescence” prior to the middle school movement of the 1990s.

2. Lee, H., & Lee.G. (1998). Middle schools or muddled schools? *Developmental Network Newsletter*, 1, p.29.

3. Chapter 5 will also investigate the variety of structures for this middle level and the debate that exists between middle schooling as a philosophy and middle schools as an institutional structure.

4. For example Hinchco, B. (1998, July). Catering for the needs of the emerging adolescent by looking at the past. *Education Today*, p.15.

## LITERATURE REVIEW

For the present study, research into statements made by New Zealand middle school supporters was conducted through a literature review of relevant articles: in particular the works of Neville (1999, 2002); Nolan and Brown (2000, 2002); Stewart and Nolan (1992); and the various writings of the New Zealand Intermediate Schools Principals' Association (NZISPA) and New Zealand Intermediate and Middle Schools' Association (NZIMSA) during the 1990s. The purpose of this investigation was to ascertain whether New Zealand middle school proponents linked the development of these institutions to a concept of "emerging adolescence" and then to identify reasons for this association.

An extensive review of the literature concerning the term "emerging adolescence" was thus undertaken, and it was found that much of this literature was American and Australian<sup>5</sup> in origin. The literature review covered educational, sociological and behavioural research. In addition to this review of academic literature an analysis of material gathered from interviewing five New Zealand intermediate and middle school principals was conducted. This work was undertaken to determine their perception of emerging adolescents, specifically from a practitioner's point of view. This comparison of research material set out to find if a relationship in fact existed between what the research literature suggested were the characteristics of "emerging adolescents," and what current practitioners in the New Zealand educational environment believed.

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5. Wherever possible New Zealand emerging adolescence research was accessed. For example, Payne, M.A. (2002). Adolescent decision-making: Comparison of adult and teenage perceptions in New Zealand. *International Journal of Adolescence and Youth*, 10, pp. 277-295.

The literature research consisted of reviewing material from three main research disciplines — biological, psychological and sociological — relevant to the term “emerging adolescence.” The biological research reviewed included such writers as; Bromberg, Commins, & Friedman (1980); Malina (1990); Montemayor (1990); and Paikoff & Brooks-Gunn (1990). The psychological research included works by; Ausubel (1980); Eichhorn (1966); Erikson (1968); Lapsley (1990); Payne (2002); Piaget (1970); Stanley Hall (1922); and Woodhead (1990). Sociological research included works by; Bakan (1997); Eccles, Lord & Midgley (1991); Hamburg (1993) Hargreaves (1986, 1996); and Lipsitz (1980, 1997).

In addition a number of more general educational theorists were included in this literature review including; Baenen (1991); Biddulph (1997); Carr-Gregg (2002); Stevenson (1998) and Thornburg (1983). The more general New Zealand educational theorists reviewed included: Bycroft (1997); Nolan & Brown (2002); Nolan, Brown, Stewart & Beane (2000) and Neville (1999). In addition a number of specifically middle school publications were reviewed to ascertain the degree to which a direct link exists between “emerging adolescence” and the middle school movement. These included organisations such as; Carnegie Corporation (1989); NMSA (1995, 2002); NZIMSA (1996) and the NZIPSA (1995).

## WHAT WERE MIDDLE SCHOOL ADVOCATES SAYING?

The endeavour to make a link between the term “emerging adolescents” and middle schools is a crucial aspect of the debate that occurred during the 1990s.

The Stewart and Nolan (1992) report, for example, recommended that middle schools and emerging adolescents be grouped together:

Although intermediate schools have traditionally catered for 11-13 year old students, the focus of research reported here is somewhat broader covering the 10-14 year old age span. This age range is generally recognized as encompassing children in the developmental stage of *emerging adolescence* who, by virtue of their rapid growth and distinctive developmental needs, require a form and quality of education different from that which other children receive.<sup>6</sup>

This first piece of research on New Zealand middle schools made a distinction between intermediate school provision for 11-13 year olds and middle school provision for 10-14 year olds. Certainly the extension of the older age-span into Years 9 and 10 — traditionally part of the New Zealand secondary school system — was one of the predictable outcomes of developing a middle school structure. Yet the lowering of the younger age-span to 10 years also suggested the inclusion of Year 6 students within a middle school. Although the debate on grade-spans and middle schools is explored in depth in chapter 5, from this first research report a degree of confusion surrounding the creation of a New Zealand middle school model became apparent when an American philosophy of middle schools was applied to the New Zealand educational system.

In this New Zealand report a direct link was drawn, however, between the institutional structure of a middle school and the term “*emerging adolescence*.” During the early-1990s, though, the NZISPA (which had commissioned the Stewart and Nolan report) avoided making such a direct link in its publications. In 1995, for instance, they stated that while:

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6. Stewart & Nolan (1992), p.2. The words, “*emerging adolescence*,” occur in italics in the original document.

It is now universally acknowledged that the years between 10 and 14 are the most vital developmental period after the critical 1 to 5 years [and] associated with the onset of puberty, and social and intellectual maturing,<sup>7</sup> emerging adolescents undergo dramatic change in all respects.

Nonetheless, the NZISPA stopped short of linking emerging adolescence directly to middle schools. It was not until 1996 and the publication of *Middle Schools: Helping to Master the “Middle Years”* that a direct link was made between emerging adolescents and middle schools by the newly formed NZIMSA. Furthermore, it was only after the association of intermediate principals had agreed in 1996 to the change in their organization's title (to remove the word “principal” and to add the word “middle”) that their publications began linking these two concepts directly together. The change in the Association's title represented more than a mere change in name, however. With it came a philosophical repositioning of the Association, one that was closer to the middle school reform movement of the USA, and away from the New Zealand intermediate school foundation. The result was that from November 1996 the NZIMSA policy statement on middle schools more closely resembled that contained in the Stewart and Nolan report:

We believe that all emerging adolescents, because of their special needs, require a form and quality of education that is very different from that which primary and secondary students receive.<sup>8</sup>

It was not only the proponents of middle schools, however, who were willing to link the term “emerging adolescents” to a particular structure of schooling —

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7. New Zealand Intermediate Schools Principals' Association. (1995). *Making the most of the middle years*. Wellington: Author, p.7.1.

8. New Zealand Intermediate and Middle Schools' Association. (1996, November). *Policy statement on middle schools*. Wellington: NZIMSA, p. 1.

albeit not a primary based middle school. The, then, President of the Post-Primary Teachers' Association (PPTA) Martin Cooney, for example, commented:

It has been accepted for some time that children and young people have four reasonably clear stages of educational development: five to seven years, eight to 10, 11 to 14 and 15 and over. This provides a logic for treating the needs of Forms 1 to 4 students somewhat differently from Form 5 to 7 students.<sup>9</sup>

While the rhetoric of middle school commentators of the mid-1990s (Hinchco, 1997, 1998; Kerr, 1996; Ward, 1997) linked the concept of emerging adolescence to the particular structure of middle schools, they were not the only ones to do so. The PPTA also used the concept of emerging adolescence to support their suggestion for converting secondary schools into Form 1 to 7 colleges in so far as a middle department (Form 1-4) could be incorporated into a Form 1-7 school. The argument that the term “emerging adolescence” applied to an actual stage in human development would appear from a perusal of statements made by educational commentators to be a self-evident truth that is beyond criticism. Before looking more critically at this term, however, it is important to recall that a concept of emerging adolescence — if not in those words then certainly in the concept — was not new to New Zealand educational debate (see chapter 1).

## HISTORICAL REFERENCES TO EMERGING ADOLESCENCE

One of the earliest (if not *the* earliest) reference by a New Zealand educator to adolescence was made by Frank Milner, the prominent secondary school

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9. Cooney, M. (1996, November 15). Education changes need to be thought through. *New Zealand Herald*, p. A13.

headmaster of Waitaki Boys' High School. In 1921, Milner's special report to the House of Representatives stated that:

The prepubescent period (six years to twelve) is that of childhood, susceptible to drill, formal discipline and the fixation of habits... It is at the termination of this stage that the period of adolescence or youth supervenes...[at the beginning of ] Standard V in New Zealand. The dawn of social consciousness in him [or her] brings with it a new host of interests and a new stage of emotional life.<sup>10</sup>

Similarly, Wells' report on his visit to America echoed the American assertion that linked the specific age of emerging adolescence with that of school structure:

I was again and again assured that these schools [junior high schools] are justifying their existence because.... (4) It is better for children of the early adolescent period - say from twelve to fifteen years of age - to be taught together.<sup>11</sup>

Such comments were supported by the Hadow Report (1926) in England and the majority Lawson Report (1928) of New Zealand. The later stated:

There is a tide which begins to rise in the veins of youth at the age of 11 or 12. It is called 'adolescence.' If that tide can be taken at the flood and a new voyage begun on the strength and along the flow of its current, we think, it will move onto for true. We therefore propose that all children should be transferred at the age of 11 or 12 from their primary school.... transferred to new ground and set in a new environment, which should be adjusted as far as possible to the interests and abilities of each range and variety.<sup>12</sup>

These early observations have led Nolan and Brown (2002) to remark that the argument for introducing separate school structures for emerging adolescents was resolved in the 1920s and yet it is still being questioned today.<sup>13</sup> Two matters

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10. AJHR, E-11, 1921, p.3.

11. AJHR, E-11, 1922, p.4.

12. Lawson, R. (1928). *Report of the syllabus revision committee set up by the Minister of Education: Hon. R.A. Wright 1926-1928*. Wellington: Government Printer, p. 18.

13. Nolan, C.J.P., & Brown, M. (2002). The fight for middle school education in New Zealand. *Middle School Journal*, 33 (4), p. 42.

remain problematic with this 1928 statement, however. The first is that even though many commentators refer to “adolescence” as a discrete stage in human development this does not, of itself, mean that such a developmental stage is supported by research evidence. Research concerning the concept of emerging adolescence will be analyzed shortly. The second is that if emerging adolescence is a stage of human development then it does not automatically follow that there may be only one school structure that best suits their educational needs. The later issue will be examined further in the chapter 5.

## THE SEARCH FOR A DEFINITION

The present research investigates the concept of “emerging adolescence” because it is one of the most common terms relating to the age and stage of pupils that is used in the literature on middle schooling. For this purpose the term “adolescence” refers to that stage when all pubertal and physical changes have ceased. In some cultures this stage is labelled as adulthood. Such a definition of adolescence,<sup>14</sup> involving the ability to have and to rear a child of one’s own, draws to an end the period labelled emerging adolescence. The middle school literature (ACSA, 1996; NMSA, 1995; NZIMSA, 1996) refers to this end-point as being at about 14 years.<sup>15</sup> The end of emerging adolescence is defined not as a specific moment but as a societal construct that implies a degree of choice over remaining at school, an individual’s decision to delay entering the adult world of work and that of childrearing. This is different from the earlier period of

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14. Hargreaves, A., Earl, L., & Ryan, J. (1996). *Schooling for change: Reinventing education for early adolescents*. London: Falmer Press, p. 14.

15. Dixon & Baragwanath (1998), p.284. These two researchers have commented in the New Zealand context that: “Traditionally, women below the age of 15 years account for less than 2% of births to adolescents in this country with figures showing the rate in 1993 to be below 1%.”

“emerging adolescence” where the individual is said to be developing the ability to make these kinds of life-forming decisions.

The difficulty with finding a commonly agreed definition of “emerging adolescence” is compounded by the fluidity with which these terms are used and applied in the literature. American literature predating the 1960s, for example, does not appear to differentiate between a period of “emerging adolescence” and a period called “adolescence.”<sup>16</sup> Recent research — especially that of sociologists — has claimed that the lack of differentiation occurs because the length of time spent in adolescence during the 1990s is considerably longer than it was prior to the 1960s.<sup>17</sup> Consequently, the term has been used in different ways according to the period in which research was conducted.

Reading a variety of literature on adolescence (Johnson, 1980; Lipsitz, 1977; Montemayor et al., 1990) indicates that different academic disciplines have defined adolescence in particular ways. Researchers have not always been specific about what the stage of “emerging adolescence” is or might be, and have frequently employed the term “adolescence” to cover the full developmental span from entry into — to exit from — this period of development. Such vagueness of definitions is compounded by writers such as Biddulph (1997) who have suggested that the years immediately prior to pubertal change also be referred to

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16. For example the work of Stanley Hall, G. (1922). *Adolescence*. (2 Vols.). New York: Appleton

17. Thornburg, H.D. (1983). Is early adolescence really a stage of development? *Theory into Practice*, 22 (2), pp. 79-84.

as “emerging” for these children because they are being exposed to others who may have already entered adolescence.<sup>18</sup>

Some researchers (Hargreaves, 1986; Lipsitz, 1977, 1980) have reached general agreement that this developmental stage is an individual process; each individual undergoes his or her own change in his or her own time to differing degrees. As Lipsitz has remarked “the myth of homogeneity (“they’re all alike”) serves as a powerful barrier to our promoting the healthy development of individual young adolescents.”<sup>19</sup> All humans, therefore, make the journey through emerging adolescence. They may have many characteristics in common, but it is important to remember that because the process happens each time to an individual it will vary greatly in duration and magnitude.

Perhaps the most notable aspect of exploring a definition of “emerging adolescence” has been the diversity of approaches that researchers have taken. Six researchers (Eccles, Lord & Midgley, 1991; Hamburg, 1993; Lipsitz, 1980; Takanishi, 1993) have referred to the complex issues surrounding attempts to define this age-group and its relative newness within Western society. Some researchers have drawn heavily on the individual, and have avoided a definition of an age-group because of the many differences that exist between individuals of this age. Others however, have not identified a particular age-group for fear that it would further reinforce a fragmented approach to our understanding of human development.

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18. Biddulph suggested that children who mix with adolescent peers are themselves then entering adolescence because they are exposed to these ideas. Biddulph, S. (1997). *Raising boys: Why boys are different*. Sydney, NSW: Finch, p.109

19. Lipsitz, J. (1980). Toward adolescence: The middle school years, in Johnson, M. (Ed). *The Seventy-Ninth Year Book*. National Society for the Study of Education, p.21.

The development of a concept of emerging adolescence has gained exposure however, because it has been used so frequently in the middle school literature. Middle school supporters have, to some degree, adopted the term to support their claims that a unique stage in human development actually exists. The term therefore, has been used within a particular societal construct, that of a school structure, (Hargreaves, 1986, 1996: Lipsitz, 1977, 1980) suggesting that much of what is attributed to the definition of emerging adolescence is sociologically oriented. Sociological research emphasises the importance of human society and culture in the development of the concept of emerging adolescence. Defining emerging adolescence, therefore, differs across disciplines, as one might expect.

#### EMERGING ADOLESCENCE: A DEFINITION

A search of the research literature uncovers a variety of labels used to describe the general characteristics of this age-group, and highlights the range and variety of terminology that has been applied to it. Stevenson suggests that such terms as “youngsters, in-betweeners, transescents, pubescents, junior high kids, middlers, teenagers, emerging adolescents, early adolescents... the transition from childhood to full adolescence”<sup>20</sup> that are mentioned in various publications all relate to this stage in human development.

Researchers such as Hargreaves, Earl, and Ryan (1996) have chosen to list a series of identifiable characteristics as a starting point to developing a definition. In this way they attempted to convey a sense of the issues that a study of this age-group raised:

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20. Stevenson, C. (1998). *Teaching ten to fourteen year olds: A rationale for responsive schooling*. New York: Longman Paul, p. 4.

Confused by self-doubt, plagued with forgetfulness, addicted to extreme fads, preoccupied with peer status, disturbed about physical development, aroused by physiological impulses, stimulated by mass media communication, comforted by day dreams, chafed by restrictions, loaded with purposeless energy, bored by routine, irked by social amenities, veneered by ‘wise cracks’, insulated from responsibility, labelled with delinquency, obsessed with personal autonomy, but destined to years of economic dependency, early adolescents undergo a critical and frequently stormy period in their lives.<sup>21</sup>

Such descriptions as these attempt to portray a series of determining features of this age-group, identifying the specific elements that may make this age-group a unique stage in human development. They convey what may be perceived to be the dominant stereotypes of this age-group adding significantly to our understanding of its suggested uniqueness. However, these descriptions are also based on western assumptions, and are not necessarily relevant across all cultures and contexts.

Does there, then, exist a stage, between childhood and adulthood, that has identifiable and specific characteristics that could be called “emerging adolescence”? Lipsitz cited Konopka’s work, wherein she concluded that once researchers acknowledge adolescence as a specific age this would raise this stage of development from one to be “endured and passed through as rapidly as possible, to a stage of earnest and significant human development.”<sup>22</sup> Furthermore, Lipsitz cited Demos (1985) definition of this stage of development as:

First of all, a matter of biology — an intrinsic development process in a physiological sense. It is also a matter of psychology insofar as it involves the resolution of internal

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21. Hargreaves, et al. (1996), p. 13.

22. Lipsitz, J. (1980), p. 15.

issues around self and others. Finally, it is a matter of social experience, or rather of social context and cultural definition.<sup>23</sup>

Three perspectives of the term adolescence are identified here, each inter-related and yet significant in its own right. The first — a biological approach — entails a study of the physiology of human development. The second — a psychological perspective — suggests an investigation of the individual with regards to how individuals develop relationships with others. The third approach — a sociological one — involves a study of how the individual's development is influenced by, and created through, living in specific cultural and societal structures.

A review of the key findings for each of these areas of research may allow some conclusions to be drawn regarding the term emerging adolescence. Specifically a search to ascertain where emerging adolescence is used as a sub-set of the term adolescence will be undertaken. In this context Vars' (1980) definition of such a subset is invaluable:

The years immediately following [the onset of] puberty are called “early adolescence,” and the young person at this stage may be referred to as a “young adolescent,” an “early adolescent,” or even an “emerging adolescent.”<sup>24</sup>

## THE BIOLOGICAL PERSPECTIVE

From the human physiology research domain, certain clearly identifiable changes occur to all humans during a period of time that sits between the two stages in

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23. Lipsitz, J. (1984). *Successful schools for young adolescents*. New Brunswick, NJ: Transaction Books, p.7.

24. Vars, G.F. (1980). Prologue, in Johnson, (Ed.), p.2.

human development of childhood and adulthood. To this end Lipsitz (1977) wrote:

Biologically, adolescence spans the years between the onset of puberty and the completion of bone growth. Puberty is defined biologically as that phase of bodily development during which the gonads secrete sex hormones in amounts to cause accelerated growth and during which secondary sex characteristics appear.<sup>25</sup>

In humans, like most other primates,<sup>26</sup> there occurs a second physical growth spurt at this time in their physical development. Rather than physical growth occurring at a steady rate once past birth, humans experience two distinct growth spurt stages of development with distinctive purposes for both. The first growth spurt occurs around two years of age whereas the second growth spurt occurs sometime between the ages of 10- and 14-years. The latter, however, does not occur at precisely the same age for each individual. As Malina (1990) explained:

Mean ages at initiation of the spurt in samples of North American and European children range from 8.7 to 10.3 years in girls and 10.3 to 12.1 in boys, with standard deviations of about 1 year in most studies.<sup>27</sup>

Many teenagers will add the final 25% of their ultimate adult height and as much as 50% of their adult weight during this second growth spurt.<sup>28</sup> This growth spurt is only one of two major biological changes occurring at this time.

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25. Lipsitz, J. (1977). *Growing up forgotten: A review of research and programs concerning early adolescence*. Lexington, MA.: Lexington Books, p.3.

26. Montemayor, R. (1990). Continuity and change in the behaviour of nonhuman primates during the transition to adolescence, pp. 19–40, in Montemayor, R., Adams, G.R., & Gullotta, T.P. (Eds.), *From Childhood to adolescence: A transitional period?* Newbury Park: Sage.

27. Malina, R.M. (1990). Physical growth and performance during transitional years (9-16). In Montemayor, R., Adams, G.R., & Gullotta, T.P.(Eds.) *From Childhood to adolescence; A transitional period?* New York: Sage, p.42.

28. Johnson, M. (Ed.) (1980). *Towards Adolescence: the middle school years*. The Seventy-ninth Yearbook of the National Society for the Study of Education. Chicago: Chicago University Press, p. 135.

The second relates to the process of sexual maturation. After the stage of puberty, which was started by the body's secretion of hormones, from a relatively immature child's body will emerge a sexually mature adult male and female with appropriate body structure. Paikoff stated:

Two processes, adrenarche and gonadarche, result in increased sex steroid secretion in the prepubertal and pubertal periods. Adrenarche involves the production of androgens by the adrenal gland, and gonadarche involves reactivation of the hypothalamic-pituitary-gonadotropin-gonadal system that has been quiescent since the foetal period and the first few months of life. Adrenarche precedes gonadarche by approximately two years, and the two are controlled by different mechanisms and operate independently of one another.<sup>29</sup>

Important biological characteristics, then, separate the adolescent growth period from other phases in human development. The appearance of primary and secondary sex characteristics — as well as the change in physique — identify this age-group as totally distinct from those either side of it. Bromberg, Commins, and Friedman (1980) related this period of growth and development, that of adolescence, as distinct from adulthood which occurs at the completion of both physical growth and after having reached sexual maturity.<sup>30</sup> Rather than referring to the stage as "emerging adolescence," Montemayor (1990) defined this stage as follows: "adolescence is chronologically midway between juvenilehood [childhood] and adulthood, it is not just an intermediary point between the two — it is a unique stage of life that includes components of both."<sup>31</sup>

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29. Paikoff, R.L., & Brooks-Gunn, J. (1990). Physiological processes: What role do they play during the transition to adolescence. In Montemayor, R., Adams, G.R., & Gullotta, T.P. (Eds.) *From childhood to adolescence: A transitional period*. New York: Sage, p. 65

30. Bromberg, D., Commins, S., & Friedman, S.B. (1980), in Johnson, (Ed.) (1980) p.125, stated that "The teenager will add the final 25 percent of his ultimate adult height, and as much as 50 percent of his adult weight. From the relatively immature child's body will emerge the sexually adult male and female with appropriate physique and body composition."

31. Montemayor (1990), p. 35.

The statistics of mean ages, however, is a vague methodology to employ as the initiation and duration of physical change varies greatly between individual humans, as well as between females and males. While the biological definition of and by itself is not accurate enough to support many of the claims made by middle school supporters for age-appropriate schooling, it is helpful in indicating that there is definitely a set of specific changes and characteristics that happen to all humans, although there may be considerable differences in their timing. Second, the term emerging adolescent may — from a biological perspective — be helpful in that it points to the existence of a continuum from childhood, before any sexual maturational changes occur through to adolescence itself, once pubertal changes have happened.

From a purely biological point of view Bromberg, Commins, and Friedman (1980) suggest that there are some significant differences in the changes that occur between males and females during early adolescence:

In males, as the testes increase in size, increased levels of testosterone, the male hormone, are observed. Sperm maturation within the testes begins at puberty, resulting in mature spermatids with reproductive capability. In females, as the ovaries increase in size, there is an increase in the production of the hormones oestrogen and progesterone. Females reach menarche, or the onset of menstrual periods, related to the cyclical pattern of hormonal secretion. As maturation is reached, and this pattern of secretion develops, there is an eruption of an egg from the ovary, or ovulation. In the year following menarche, many of the cycles may be anovulatory, particularly in early maturing females.<sup>32</sup>

These biological differences also occur at different rates for each individual. It is not unusual, for example, to find up to a six-year difference in biological age

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32. Bromberg, et al. (1980), p.139.

amongst a chronologically homogenous class of students at this level.<sup>33</sup> Along with this sexual development physical growth and development occurs. Boys develop a greater physical strength and tend to be more agile by the end of this growth spurt than girls. Hormonal changes — in combination with physical strength, (and societal expectations) — tend to assist the development of male aggressive behaviours both socially, on the sports field, and in anti-social situations. Research into primate development also indicates some interesting parallels to human male development. In Montemayor et al's. (1990) work into non-human primate development the researchers discovered that “play between juveniles primarily involved chasing, while male adolescents … are more apt to wrestle.”<sup>34</sup> Furthermore, they concluded that “attraction to others appears to be a stronger force for leaving the mother-offspring orbit than a maternal push towards separation.”<sup>35</sup>

These research conclusions would be interesting to pursue among a human research sample. The area of biological research is one where the weight of clinical evidence for a specific age-group being linked with emerging adolescence is developing. This research identifies a series of definite changes that occur to all humans as they develop between 10 and 14 years. It also clearly differentiates between the changes that are occurring to males and to females at the same time. While these changes occur at individual rates the majority of young humans pass through this developmental stage.

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33. Johnson, (Ed.). (1980), p. 21..

34 . Montemayor et al. (1990), pp.22-30.

35. Montemayor et al. (1990), pp.22-30.

However, to define emerging adolescence as involving merely a series of biological changes is to underestimate the complexity of the process occurring within each individual at this stage in his or her development. Those educational commentators opposed to the concept of age-appropriate schools make much of the statement that each person passes through this stage individually, rather than as a cohort. Therefore, it is necessary to investigate these biological changes from other perspectives, particularly from psychological and sociological viewpoints.

## PSYCHOLOGICAL PERSPECTIVES

The research of psychologists (Erikson, 1968; Hall, 1904; Hoffman, 1980; Piaget, 1970) working in the field of emerging adolescence built on the biological research outlined above by identifying a range of cognitive, psychological, moral and emotional developments that also occur during this period of human growth.

In 1922 the American psychologist G. Stanley Hall<sup>36</sup> developed the theory of adolescent “storm and stress.” He contended that while childhood was dominated by instinct, adolescence was susceptible to environmental influences. Hall believed that adolescents underwent widely fluctuating, unpredictable mood swings; this, he suggested, was an identifiable characteristic of this age-group. Hall’s behavioural approach accentuated the “separation from parent” aspect of pubertal development. In other words, as each person developed a greater sense of himself or herself in the world there was a natural process of separation from the parent or adult who had raised them. This separation, Hall concluded, frequently

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36. Stanley Hall, G. (1922). *Adolescence*. (2 Vlms.). New York: D. Appleton & Co.

expressed itself in anti-social behaviour, emotional unrest and interpersonal conflict.<sup>37</sup>

However, some 70 years later, Paikoff and Brooks-Gunn (1990) have refuted this argument. They claimed that “the picture that emerges [from recent research] suggests that mood variability itself varies substantially across adolescents, with the majority exhibiting fairly stable and predictable mood changes over time while [only] a minority experience true “storm and stress.””<sup>38</sup> The populist belief — fuelled by the motion picture industry of the 1960s and 1970s — of the rebellious teenage years does not appear to hold true, according to recent research. The duration of emerging adolescence may coincide with an emotionally quieter period than Hall assumed and “storm and stress” may be more a characteristic of adolescents as they form their adult relationship with the world at large, than as a characteristic of the emerging adolescent stage. It may be that the characteristics that Hall noticed in 1904 have shifted to a later stage in human development owing to societal change. If this is so then the research of Paikoff and Brooks-Gunn would give support to those theorists who claim that emerging adolescence is a societal construct created as a response to individuals experiencing longer periods in childhood within Western society.

From a developmental psychology perspective Donald Eichhorn (1966) developed the term *transescence* to define the stage of human development:

which begins prior to the onset of puberty and extends through the early stages of adolescence. Since puberty does not occur for all precisely at the same chronological age in human development, the transescence designation is based upon the

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37. Stanley Hall (1922), p. 32.

38. Paikoff & Brooks- Gunn (1990), p. 73.

many physical, social, emotional, and intellectual changes that appear prior to the puberty cycle to the time in which the body gains a practical degree of stabilization over these complex pubescent changes.<sup>39</sup>

Eichhorn was among the first group of researchers to differentiate between a stage of adolescence and that of emerging adolescent. This research attempted to relate the range of physical changes that occur to the cognitive and emotional developments that lead to the transition of the individual to adulthood.

Erik Erikson's<sup>40</sup> taxonomy explained the process of human development in terms of a series of dual crises that had to be addressed before the individual can develop to the next level and enter adulthood. The fourth such crisis, for example, is that of the “development of industry” or the “internalization of a sense of inferiority” wherein the emerging adolescent strives towards competence and mastery of tasks allocated to him or her. He or she begins to recognize the importance of becoming a worker or provider. To pass through this crisis of identity requires the prerequisites of physiological growth, mental maturation and a sense of social responsibility, Erikson suggested. These prerequisites exist during the early stages of adolescence. An individual cannot experience the “crisis” as suggested by Erikson, until the prerequisite biological changes have occurred.

By comparison, Piaget's<sup>41</sup> taxonomy of development held that a child reasons on the basis of objects, that he or she uses concrete operations until at some point in

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39. Bycroft, D. (1997). *Emerging adolescence: Study Guide 2*. Teachers Qualification Centre: Advanced Studies for Teachers. Christchurch: Christchurch College of Education. p. 1.

40. Erikson, E.H. (1968). *Identity: Youth and crisis*. New York: Norton.

41. Piaget, J. (1970). *The science of education and the psychology of the child*. New York: Orion

early adolescence the person begins to reason on the basis of symbols and principles, or develops the use of formal thought.<sup>42</sup> According to Piaget, it is this emergence of formal operational structures that defines the move into and through emerging adolescence. In Piagetian terms the emerging adolescent moves from the childlike concern about the here and now to the hypothetical future and spatially remote aspects of abstract thought. Such individuals become able to observe themselves thinking. They begin to think abstractly, generalise, think about thinking and become “capable of appreciating the elegance of theorem, the wit of metaphor, the power of ideology.”<sup>43</sup> The emerging adolescent reveals a growing capacity for conceptualisation, for considering more than a single idea at a time, and for planning steps for expressing his or her own ideas. Such adolescents benefit from learning systematic approaches to creative problem solving.

However, Thornburg (1983) has argued that many individuals do not complete this development into formal operational thought until well into adulthood, if at all. As Thornburg concluded:

The capacity for formal or abstract thought, as defined by Piaget, is not occurring as early as previous writings have implied. It is quite clear that individuals moving into middle or junior high schools are dominantly logical, yet concrete thinkers.<sup>44</sup>

Therefore, while an individual can exist in adolescence — without achieving high-level thought processes — the nature of emerging adolescence is such that each

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42. Ausubel, D.P. (1980). Enhancing the acquisition of knowledge. Cited in Johnson (Ed.). (1980), (p. 249) stated that: “It is during the period of transescence that the transition from concrete to abstract cognitive functioning typically begins to occur in cultures such as our own.”

43. Lipsitz (1980), p. 17.

44. Thornburg (1983), p. 81.

individual has started the progression through these cognitive levels. Recent psychological research has suggested that emerging adolescence — the movement from childhood to adolescence — is an interim stage between these two states. Psychological research suggests that as increasing time is spent in childhood — as a societal construct of Western society — the progression through to the next stage, that of emerging adolescence will be delayed.

Furthermore, psychological research examines a variety of other characteristics of emerging adolescents. One of these is the development of the emerging adolescent's increasing awareness of the need for laws and for order. The emerging adolescent begins to develop an awareness of societal needs. Carol, Gilligan, and Kohlberg,<sup>45</sup> suggest that a conflict develops between moral relativism and black and white absolutism for emerging adolescents. The individual moves from the absolutes of right and wrong in childhood to an appreciation of degrees of truth and the ability to apply different standards of truth to different situations in adolescence.

The individual gains a powerful sense of the future while acquiring a greater sense of scepticism or doubt. As Lapsley has commented “knowledge is seen to be a manufactured mental product that is person relative. As a consequence adolescents are gripped with “Cartesian anxiety” or a sense of “epistemological loneliness.”<sup>46</sup> Lapsley further commented that:

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45. Lipsitz (1977), p. 47.

46. Lapsley, D. K. (1990) Continuity and discontinuity in adolescent social cognitive development. In Montemayor, R. Adams, G. R. Gullotta. T. P.(Eds.). (1990). *From Childhood to adolescence: A transitional period?* Sage, pp.185-187., Lapsley was quoting the earlier work of Chandler (1975).

Adolescents who are awash in sceptical doubt and who suffer from the ensuing “vertigo of relativity” are seen to respond with characteristic manoeuvres, such as clique formation, intellectualization, intolerance, stereotypy, and also by impulsivism (acting without thought), intuitionism (doing what feels good), conformism (doing the done thing), and indifferentism (acting on whim).<sup>47</sup>

The individual begins to develop a sense of the future and becomes increasingly sceptical about the ability of human laws to change peoples’ conditions for the better.

Furthermore, psychoanalytic theory stresses the interplay between biological changes caused by the release of hormones and hormonal change that disrupts the individual’s impulse control systems. At the same time the individual develops anxiety because of the reduction in close parental dependence. The emerging adolescent is forced to create his or her own moral stance or to erect internal defences to ward off these inappropriate responses and to maintain a personal control system.<sup>48</sup> This area of research links the obvious physiological changes occurring with associated psychological changes in the way in which emerging adolescents relate to their world.

This psychological perspective summarizes various behavioural, emotional and cognitive changes that emerging adolescents experience. A range of theories are located within this perspective. The traditional interest in childhood by developmental psychologists allowed, then, for emerging adolescence to be seen as a transitory period between two stages. Eichhorn, for example, defined the end of this period of transescence to be when the majority of one’s peers had entered

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47. Lapsley (1990), p. 187.

48. Hoffman, M. (1980). Fostering moral development. In Johnson (Ed.). (1980), pp.180-181.

puberty and all youth had turned their attention to dating, the typical pastime of high school students.

### **Adult-adolescent relationships**

One aspect of the psychological perspective on emerging adolescents is the changing and evolving relationship they have with their parents and other significant adults in their lives. American middle school literature<sup>49</sup> has highlighted a series of issues concerning the changing relationship that develops between adolescents and parents/caregivers and the apparently increasing role played by their peer group in their lives. These issues tend to fall into one of four categories. These categories, however, lack research evidence so they are included here merely to indicate areas requiring further research.

First is the issue of an adolescent's separation from the family unit. Where childhood is defined by the nurturing and caring provided by key adults, adolescence tends to be characterized by increasing separation between adults and adolescents. In the psychoanalytical perspective of Sigmund (and, later Anna) Freud, it has been claimed that "Attachments to both parents are said to involve strongly ambivalent feelings of love and hostility."<sup>50</sup> The important developmental task of adolescence from this perspective is to redirect "[sexual] object ties such that attachments to parents come to be replaced by attachments to peers."<sup>51</sup>

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49. For example Baenen, J. (1991). *How to enjoy living with a preadolescent*. Columbus, Ohio: National Middle Schools' Association; Baenen, J. (1991). *More how to enjoy living with a preadolescent*. Columbus, Ohio: National Middle Schools' Association.

50. Hill, J.P. (1980). The family. In Johnson (Ed.). (1980), p. 36.

51. Hill (1980), p. 36.

The parental hugs and caresses that only a short time earlier were signs of affection tend to be avoided by early adolescents. Where they had once accepted their parents' value system unquestioningly, that of the peer-group now becomes more prevalent. Difficulties arise, middle school proponents claim, in keeping lines of communication open between emerging adolescents and adults. The desire for independence by the emerging adolescent is balanced by the need to form strong bonds with trusted adults and the need to create peer role models. Internationally middle school proponents assert that this period of ambivalence is unlike the developmental stages that occur before or after emerging adolescence and that it requires teachers, in particular, who are responsive to this need.<sup>52</sup>

The second related developmental issue is the increased importance assigned to the peer group as a partial replacement for the family unit. In matters of fashion and current lifestyle the influence of the peer group appeared to be greatest while the influence of the family is still evident in more life-forming decisions:

Studies of parent-peer cross-pressures suggest that parents more often influence matters of educational and occupational choice, while peers more often influence matters of dress, appearance, and custom that determine peer acceptance.<sup>53</sup>

However, within the New Zealand context even greater weighting needs to be given to the relevance of the peer-group among Māori and Pacifica adolescents.

As Anne Smith (1998), has commented:

In Polynesian culture the peer group is tremendously important and a separate sphere to the adult world. Children have less contact with the adult world and are inclined to be less dependent than Pakeha children. From an early age they share responsibilities and problems

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52. Stewart & Nolan (1992), pp. 66-68.

53. Hill (1980), p.43.

with each other. A type of consensus leadership develops in many peer groups.<sup>54</sup>

The third issue of the adult-adolescent relationship is the tendency for the emerging adolescent to develop significant adult role-models outside his or her immediate family.<sup>55</sup> Failure to experience achievements supported by an adult role-model can develop a sense of inadequacy or inferiority, leading in some instances to despair or anti-social behaviour. The middle school literature makes much of the assertion that there seems to be a particular (supportive) role for a trusted adult to play in the development of the emerging adolescent within Western society. This supportive adult role helps to maintain the attributes of hope and optimism that typically characterize youth. As the Australian Curriculum Studies Association (ACSA) stated “while all children need trusted adults, during early adolescence there seems to be some special quality about the relationship which allows that trust to be established and utilized.”<sup>56</sup>

The fourth issue concerning this adult-adolescent relationship is the development of inter-generational conflict and strife. A frequent assertion made is that because society has begun to change rapidly, each new generation is being raised in a culture alien to their parents’ generation.<sup>57</sup> The adolescent is arriving at the peak of his or her physical prowess just as the parents are realizing their own frailty and

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54. Smith, A. B. (1998). *Understanding children's development: A New Zealand perspective*. Wellington: Bridget Williams, p.196.

55. Black, E. (2002, June 15-16). Help over the teen hurdles. *The Weekend Herald* p. G2. As Carr-Gregg, a leading Australian teenage psychologist was reported as saying “it is vital that he or she [teenagers] has access to a “charismatic adult” says Carr-Gregg. This could be a teacher, neighbour, relative or coach.”

56. Australian Curriculum Studies Association. (1996). *From alienation to engagement: Opportunities for reform in the middle years of schooling*. (Volume 2) Canberra: Australian Curriculum Studies Association, p.35.

57. Carr-Gregg, M. (2002, May 31). Speech given at the Auckland Intermediate Schools Teacher Only Day, North Shore stadium.

physical limitations. This occurs while adolescents are establishing utopian ideals at the very time their parents may have become more pragmatic through their life experiences. Similarly, Māori and Pasifika parents may be much younger than their European counterparts and grandparents frequently may take the prominent role in child-rearing.<sup>58</sup> However, when conflict does occur it tends to be often over the minutiae of adolescent lifestyles rather than the fundamental values that both generations hold in common.

What is *not* clear from the outline of these four issues is the extent to which they are psychological issues — common to all adolescents as part of their maturation and development — or sociological ones. Many commentators on these issues have referred to these studies having been carried out solely in Western societies. What may appear at first glance to be psychological determinants may also be sociological responses related to the particular culture in which adolescence is set.

In particular these four issues have been developed mainly in the middle school literature, but as yet they are not found commonly in psychological research. This may be because schools are involved more directly in the daily lives of emerging adolescents with the result that the middle school literature should be placed within the sociological research cadre. However, significant psychological research data is still required to substantiate many of the claims made regarding adult and peer relationships among emerging adolescents.

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58. Smith, A. (1998), p. 196.

## A SOCIOLOGICAL PERSPECTIVE

Sociological research (Bakan, 1997; Hamburg, 1993; Hargreaves, 1986, 1996; Lipsitz, 1980, 1997) has emphasized the importance of human society and culture in the development of a concept of “emerging adolescence.” Sociologists have commented that this transition time between childhood and adulthood is experienced mainly in Western industrialised societies. Furthermore, they observed that it is a comparatively recent phenomenon not experienced in many other cultures of the world.<sup>59</sup> Up to this point the analysis of emerging adolescence has tended to focus on the individual characteristics of an adolescent. However, as outlined earlier, sociologists maintain that the development of the adolescent needs to be explained in terms of a society’s impact on their lives, to a much greater extent than the behaviouralists or psychologists have been able to take account of. The adolescent, sociologists contend, does not survive in isolation — especially in Western society — and the pressures of living in this type of society are readily visible in relation to emerging adolescents.

Bakan<sup>60</sup> suggested that adolescence is an American invention or discovery made in the late-nineteenth or early-twentieth centuries, principally to extend childhood. He contended that adolescence is a societal construct made up of compulsory education, child labour laws, and the special legal procedures that exist for juveniles.<sup>61</sup> Where societies require a large manual workforce, adulthood begins at an early age. In Western society — with its emphasis on developing people’s cognitive ability — a prolonged childhood, or period of “emerging adolescence,”

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59. Hargreaves, A. (1986). *Two cultures of schooling: The case for middle schools*. London: Falmer Press, pp. 4-9.

60. Bakan, cited in Lipsitz (1977), pp.83-85.

61. Lipsitz (1977), p. 4.

has evolved. Sociological theorists have drawn attention to the differing characteristics of various cultures including those cultures within Western society. What may hold for one culture, therefore, may not be the same for another. Citizens of multi-cultural societies, such as New Zealand, must be conscious of this important caveat to the generalisations made in much of the sociological literature.

It can be argued that society, through its laws and social institutions, has created emerging adolescence as an age-group. Consequently, many of the stresses these young people experience can be attributed to these institutional restrictions. To this end Lipsitz commented “we acknowledge through our laws and social institutions [that] we have already created early adolescence as an age-group.”<sup>62</sup> Legal restrictions on being able to purchase cigarettes (12 years), being left home alone (13 years), obtain a driving licences (15 years) or leaving school (16 years)<sup>63</sup> delay entry into adulthood by definition; the adult ability to make life-forming decisions of one’s own.

On the one hand the emerging adolescent is encouraged to develop a sense of self and a greater degree of independence. They achieve this through attempting to determine the social contexts in which they will participate, by making choices about the friends they will have, the subjects they will take at school, and the multitude of other areas that affect their future. Yet, on the other hand, most social institutions then demand increasing conformity to societal rules and adult roles.

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62. Lipsitz (1980), p. 10.

63. These are New Zealand examples of legislative requirements that are tied to age.

Almost invariably the populist adolescent literature (Biddulph, 1997; Carr-Gregg, 2002; Stevenson, 1998) refers to the increasing complexity of Western society. Just a generation or two ago children lived in two-parent families in daily contact with the work that their parent, usually the father, undertook. Current Western society is characterized by a greater number of solo parent families, the absence of fathers from the home, and a distancing of the child from the reality of work. As Anne Smith has commented “probably about a third of all domestic groups in New Zealand belong to the nuclear family pattern, with the husband as breadwinner and two dependent children.”<sup>64</sup> Not surprisingly, then, sociologists suggest that there is a need to identify a new human developmental period — that of the emerging adolescent — so that the individual can be readied for the new requirements of an allegedly ever-increasingly complex society. Fewer opportunities to participate meaningfully in the adult world have created new stresses and demands on individuals, as they progress towards adolescence.

### **Sociologists and schooling**

Some sociologists (Hargreaves, 1996; Lipsitz, 1977) have suggested that Western society currently has no important “rites of passage,” which mark the transitions into and out of adolescence, unlike those of childhood and adulthood.<sup>65</sup> Much of adolescence is depicted as a waiting time, a marking of time before life can really begin. Earlier rites such as the Jewish bar mitzvah or confirmation in Christian churches now apply to a much smaller cohort of adolescents as the traditional

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64. Smith, A. (1998), p.187-188. Or as Hamburg (1993), stated “only six per cent of American families are constructed on the “Norman Rockwell family model,” of the father as a breadwinner, mother at home, and two children,” p.468.

65. Lipsitz (1977, p. 5), has claimed: “We have no important rituals, the rites-de-passage, which marks transitions into and out of adolescence.”

importance of churches declines in Western society. As one New Zealand commentator, Alan Davidson suggested:

The church [has] struggled with very mixed success to relate itself to the wider society. The marked overall decline in church adherence, membership and attendance in the major churches [has been] accompanied with division over theology, morality and political involvement.<sup>66</sup>

Hargreaves (1996) remarked that in many Western societies the movement to a middle school or junior high school marks a change away from childhood on to a new stage in development.<sup>67</sup> Schools are one of modern society's main mechanisms for socialization and they and their staff can exercise powerful influences on the emerging adolescents' development. As Lipsitz has commented:

What we can say at this point is that young adolescents, at a critical stage of self-definition, take their signals from society at large and from their subculture. They are dependent upon social institutions, like the schools, for the limitations or the boundlessness of their aspirations.<sup>68</sup>

For many individuals this act of moving between schools has become the most significant rite of passage for this age-group. Hargreaves referred to "social markers" — such as entry to a junior high school or independence from a family of origin — to be a defining point of adolescence.<sup>69</sup> The assumption is that where children do not have one of these markers their development into adolescence may be delayed. For many adolescents in Western society, this stage in their life is frequently marked by shifting from a close-knit homeroom primary classroom to a larger subject oriented institution. Children in primary schools are taught by one adult, whom they often come to trust, usually for several years of their life. In

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66. Davidson, A. (1997). *Christianity in Aotearoa: A history of church and society in New Zealand*. Auckland: Uniprint, p. 168.

67. Hargreaves (1996), pp. 18-19.

68. Lipsitz, quoted in Johnson, M. (Ed.). (1980), p. 29.

69. Hargreaves (1996), p. 18.

contrast, adolescents in secondary school are taught by a range of teachers throughout the day. Ahola-Sidaway described this as a change from “the world of gemeinschaft to the world of gesellschaft, from the personal and supportive world of community to a more distant and impersonal world of association.”<sup>70</sup>

To further complicate this issue of school transition at least 30 different grade-span combinations exist in American schools to cater for this age-group.<sup>71</sup> Similarly, in New Zealand, a wide variety of different age-grade institutions exist to cater for the schooling and educational needs of emerging adolescent.<sup>72</sup> Not only is there little consensus on what sort of school best suits the requirements of this age-group but also there is little agreement about what constitutes an effective programme for emerging adolescents. Lipsitz’s comment points to this dilemma as follows: “As unsure as middle-grade schools are of their academic purposes, they are even less assured about their role in the socialization of children to adulthood.”<sup>73</sup>

Emerging adolescence is also characterized by the search for a personal identity that is separate from the care group who supported them in childhood. While this sense of self-worth is formed in large part from the interactions these adolescents have with the significant peers and adults in their lives, it is also influenced by the speed of physical maturation. Early or late physical growth developments almost

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70. Hargreaves (1996), p. 19.

71. Epstein, J. (1990). What matters in the middle grades: Grade spans or practices. *Phi Delta Kappan*, 71 (25), p. 438.

72. Education Review Office (ERO), (2001), pp. 3-4. This report outlines five different grade-span school structures. These include; full primary schools, intermediate schools, area schools, Form 1-7 colleges and composite (middle) schools.

73. Lipsitz (1984), p. 8.

always have a significant impact on the individual's self-perception and self-esteem.<sup>74</sup>

This overview of some of the key issues that sociological research has identified gives the strongest level of support for age-specific schools to be established. The biological perspective, it will be recalled, accounts for the physiological changes that occur in every individual although by itself it does not justify age-appropriate schooling. Based upon research on psychological developments in relation to the individual, however, schools have had to develop specific programmes to cater for this phase of human development. It is at this point — that of the societal construct of schooling involving the need for an agency in society such as schools to prepare these individuals for a productive life — that the concept of age-appropriate schooling is at its most relevant.

While a Year 7 pupil may not have reached puberty, he or she can still be exposed to a social context where the peer group and the programmes of the school are geared for students who have begun puberty. Similarly, a Year 10 pupil may not have completed all the developmental (physiological and psychological) changes that researchers suggest defines adolescence before having to change schools to a high school. However, this is one way in which Western society can prepare its individuals for entry into adulthood. Schools cater for certain age-groups, sometimes before they are cognitively (or physiologically) ready and often while they are experiencing developmental changes. There appears to be support from sociologists for the belief that age-appropriate schools can meet the requirements

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74. Lipsitz (1980), pp. 14-15.

of the majority of pupils who attend them. As Eccles, Lord, and Midgley (1991) have suggested, “behaviour, motivation, and mental health are influenced by the fit between the characteristics individuals bring to their social environments and the characteristics of these social environments.”<sup>75</sup>

Furthermore, some researchers (Hargreaves, 1996; Lipsitz, 1977) assert that the move of a child from a primary school to a middle school, of itself, involves a “rite of passage.” This physical shift, in and of itself, acts in part as the defining moment for the start of adolescence, because the middle schools’ educational programmes are organized in a different manner to those of the primary school. The middle school, for example, requires the possible adoption of a uniform, different peer expectations at recess time, and the common practice of travelling further to and from school. Each of these new requirements act as a means of creating an event that may mark a specific start to adolescence, particularly in Western society.

From this review of the three perspectives — biological, psychological, and sociological — certain conclusions may be drawn with regard to age-specific schooling for emerging adolescents. However, before drawing these conclusions, the concept of “emerging adolescence” as a developmental stage, and in particular the phrase “needs of emerging adolescence,” requires further analysis. These two terms are used frequently in the literature relating to age-specific schooling structures.

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75. Eccles, J.S., Lord, S., & Midgley, C. (1991). What are we doing to early adolescents? The impact of educational contexts on early adolescents. *American Journal of Education*, 99, p. 523.

## EMERGING ADOLESCENCE: A DEVELOPMENTAL STAGE

The previous discussion has outlined three different perspectives on emerging adolescence as they are covered in the relevant research literature. A representative sample of characteristics of the emerging adolescent have been outlined, including the differences between male and female development and the effect adolescence has on redefining relationships with adults. Should the emerging adolescent then be seen to be at a particular stage in human development requiring specific strategies and understandings to assist him or her in his or her development or are these strategies and understandings simply a continuation of the changes that have been occurring since childhood?

On this point there appears to be at least two schools of thought. On the one hand some theorists (Lapsley, 1990; Selman & Byrne, 1974) suggest that emerging adolescence is a transitory phase that all humans move through. Each individual, these theorists suggest, develop at differing rates and to his or her individual timetable. The argument that humans move from concrete to abstract thought — owing to the movement of an age cohort through developmental stages — has tended to be refuted by these researchers. Research into the theory of interpersonal understanding, the domains that indicate growth apart from ones initial care givers, was based on a hierarchy of four levels.<sup>76</sup> Selman and Byrne's 1974 research indicated the following results:

In a study of 4-, 6-, 8-, and 10- year olds, [the researchers] reported that 60% of 10-year-olds were at level 2, and the remaining 40% evenly divided between Levels 1 and 3. So, at the threshold of early adolescence, 80% of 10-year-olds were

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76. According to Lapsley, Level 1 was the level of individuals and persons, the stage of self-reflection. Level 2 that of close friendships, level 3 of peer-group orientation and then level 4 that of a parent-child relations. These four levels covered the development from early childhood through to late adolescence and early adulthood. Lapsley (1990), p.194.

likely to be no higher than Level 2 in social perspective-taking.<sup>77</sup>

The considerable overlap during early adolescence therefore, according to this research, of levels 2 and 3, and the persistence of level 3 into adulthood, suggested that early adolescence could not be distinguished from childhood. The concept of a clear progression of development in interpersonal understanding was not proven by this research.<sup>78</sup> Selman and Byrne claimed that while significant development does occur during these years there are insufficient similarities to enable this to be identified as belonging to a particular age-group. Furthermore, they argued that human development should be considered as a single continuous process — not one divided into distinct age-groups. Therefore for these theorists the concept of an age-specific school is irrelevant, if it is to be based on the psychological theories of individualism.

These findings are countered by five other researchers (Eichhorn, 1966; Erikson, 1968; Hall, 1922; Hargreaves, 1986, 1996; Lipsitz, 1977, 1980, 1990), who claim that there *is* sufficient similarity within a cohort to make emerging adolescence an identifiable group. To this effect Stewart and Nolan stated:

The North American educational researcher, Lounsbury (1982), went so far as to say that no other level has so clear and legitimate a claim to being designated unique as do children in the period of transition between childhood and full blown adolescence.<sup>79</sup>

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77. Lapsley (1990), p. 194.

78. Lapsley (1990), p. 195.

79. Stewart & Nolan (1992), p. 13.

Generally the theorists who support this contention tend to be those already working with this age-group as educationists in this allegedly specialized field.

As Lipsitz (1990) stated:

First, developmentally, there are “centres of similarities” when we look at the characteristics of physical, emotional, social and intellectual growth. Second, we are rather acknowledging that through our laws and social institutions we have already created early adolescence as an age group.<sup>80</sup>

These theorists suggest that the development of emerging adolescence — as a societal construct — allows children the time to develop the skills necessary to survive in an increasingly complex social context. Much of the time spent in adolescence appears to be spent waiting for adulthood, but this may be the last opportunity for society to intervene in the development of the individual before he or she begins to make his or her contribution to society. The Carnegie Corporation document *Turning Points*<sup>81</sup> referred to the opportunity that early adolescence offers for students to either choose a productive and fulfilling life, or at the very least for society to provide the last best chance for each adolescent to avoid a diminished future. This report stated:

Middle grade schools — junior high, intermediate, and middle schools — are potentially society’s most powerful force to recapture millions of youth adrift, and help every young person thrive during early adolescence.<sup>82</sup>

Such a sociological response underpins much of the rhetoric of the middle school movement. Many of the American middle school documents build a case for societal intervention in the development of individuals, where the greatest good (the interests of the collective) is weighed against the personal right of the

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80. Lipsitz (1990) quoted in Montemayor et al. (Eds.). (1990), p. 9.

81. Carnegie Corporation. (1989). *Turning points: Preparing American youth for the 21<sup>st</sup> century*. New York: Author.

82. Carnegie Corporation (1989), p.8.

individual. The concept of emerging adolescence, as defined by the middle school literature, contains within it a clearly articulated set of needs researchers suggest emerging adolescents share in common. Out of this research a significant body of material has been created about the special needs that this group have; needs that should be catered for by all organisations with an interest in this age-group.

### **The perceived needs of emerging adolescents**

As with the discussion above however, is it the case that these needs exist for all emerging adolescents or are they merely a societal construct created from the existing schooling structures of Western society? The concept of “needs” in itself is problematic within the research literature. Woodhead<sup>83</sup> has contended that “needs” is frequently used as a shorthand term, often taken at face value, and not given the critical attention it requires. While the identification of needs — as the taxonomies of needs will show shortly — “appear to be a matter of empirical study by the psychologist, or close observation by professionals,”<sup>84</sup> they also “convey considerable emotive force, inducing a sense of responsibility and even feelings of guilt.”<sup>85</sup>

Woodhead drew an important distinction between physiologically based needs, such as food, warmth, water and so forth, and those social and cultural needs which others, often adults, perceive to be important qualities and attributes that adults believe children should acquire. Therefore, needs can be identified as merely every child’s biological and psychological requirements or as a “cultural

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83. Woodhead, M. (1990). Psychology and the cultural construction of children’s needs. In James, A. & Prout, A. (1990). *Constructing and reconstructing childhood: Contemporary issues in the sociological study of childhood*. (pp. 60-77). London: Falmer Press.

84. Woodhead (1990), p. 63.

85. Woodhead (1990), p. 63.

construction superimposed on children ‘in their best interests’ as future adult members of a society, [with] personal values and cultural ideologies hav[ing] a much bigger part to play.”<sup>86</sup>

When any taxonomy of needs is analysed, Woodhead suggested, each need should be critiqued to find where it fits within a four-level hierarchy. Level one referred to needs that meet a child’s biological or psychological nature, such as the need for food. Level two concerned those needs that adults can infer from the specific dangers of the world that the child has entered (pathological needs). Level three, by comparison, related to needs that adults judge children require as experiences that are culturally adaptive and that form part of the social setting of the child. Finally, the fourth level contains highly cultural constructs of needs including those needs most highly valued by a society. Many of the needs listed in the following taxonomies, it can be suggested, would fit into this fourth level. Samples of taxonomies of needs have been collated from four research reports and appear in table one, (page 178).

Such an analysis of “needs” is necessary in order to “disentangle the scientific from the evaluative, the natural from the cultural.”<sup>87</sup> Needs — if not analysed — could be assumed to be part of the psychological literature when many of these needs, pertaining in particular to emerging adolescents, may more accurately constitute part of the sociological construct of schooling. Researchers such as Vars (1980), Bromberg, Commins, and Friedman (1980), and Malina (1990) have emphasized the change in physical appearance and development of sexual

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86. Woodhead (1990), p. 65.

87. Woodhead (1990), p.65.

maturity as being a key element in establishing the needs of the emerging adolescent. The concept of body image — one's self-picture — therefore, becomes a crucial aspect of adolescent change. As Stevenson suggested body image or personal perception assumes greater importance for adolescents:

At thirteen I thought more about my acne than about God or world peace. At thirteen, many girls spend more time in front of a mirror than they do on their studies. Small flaws become obsessions. Bad hair can ruin a day. A broken fingernail can feel tragic.<sup>88</sup>

This stage of life involves physical, and particularly sexual, changes occurring within the individual who is now better able to reflect upon and give meaning to these changes. They also occur at a time where specific social and cultural meaning is acquired and becomes evident in relation to the development of an adult body. These physical changes — coupled with the physiological need to begin the individual's separation from the family and establish independence — may mark the beginning of the formation of significant interpersonal relationships. Along with these changes comes the individual's development of educational and vocational plans. In this regard Nolan, Brown, Stewart & Beane (2000) commented: "During emerging adolescence individuals develop life-long attributes and qualities such as self-esteem, achievement orientation, social attitudes and identity as a person."<sup>89</sup> It is further asserted by these researchers that as adolescents grow in confidence, through positive life experiences, they can be held increasingly accountable for their actions and participate in the diversity of

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88. Stevenson (1998), p. 90.

89. Nolan, C.J.P., Brown, M.A., Stewart, D.J., & Beane, J. (2000, September). *Middle schools for New Zealand: A direction for the future*. A paper presented at the annual meeting of the TEFANZ Conference, Christchurch, p. 4.

experiences that enrich their adult life. Unfortunately such research rarely comments on the many negative life experiences that adolescents also face.

Table one lists four such taxonomies of emerging adolescents' needs devised by theorists over the last three decades. There is, probably not surprisingly, a high degree of overlap between the lists. All four hold adolescent participation in the wider society and world to be crucial. This activity requires the development of decision making skills and the creation of opportunities to practice them in real life situations. Interactions with their peer group — and the subsequent building of trust and affection — act as a corollary to the adolescents' creation of a sense of themselves and the development of a set of personal values with which to live their lives.

Equally, these taxonomies of needs arise from current schooling structures; either those elements that educationists believe to be the most necessary, or as a response to those current school practices that they suggest require improvement. These researchers claim that these needs serve as a justification for age-appropriate middle schools and, as such, must be read within this context. Such lists of adolescent needs tend to be used to add justification to the development of specific teaching programmes that meet what are considered to be the unique needs of this age-group. However, many of these needs could relate to any age-group, and do not necessarily appear to be as age specific as commentators wish to suggest.

TABLE 1. Comparisons Between Four Taxonomies of the Needs of Emerging Adolescents.

The American Office of Child Development 1973	Joan Lipsitz 1984 (America)	Report of Junior Secondary Review 1990 (Australia)	NZEI Position paper 1994 (New Zealand)
Participate as responsible members of society, workplace, home	Meaningful participation in school and community	Become aware of the social and political world	Growing social awareness and concerns
		Think in more abstract ways	
		Establish own sexual identity	Increasing awareness of their sexuality and social activities
		Establish or maintain relationships with adults	Re-examination of family allegiances
Decision making experience	Routine, limits, structures	Experience decision making	Desire for regulation and direction
Interact with peers	Interaction with peers	Experience social acceptance, gain support from peers	Increasing peer allegiances: desire for the approval of peers
Discover self	Self exploration	A sense of Who I am	Heightened interest in their personal appearance
Own value system		Personal and social values	
Try out roles	Diversity of experience	Adjust to profound changes, physical, social, emotional, intellectual.	Rapid changes in physical, social, emotional and intellectual growth
Sense of accountability	Competence and achievement	Positive self confidence through success	Increased preference for team and competitive sport
Capacity to enjoy life	Physical activity	Grow towards independence	Periods of abundant energy, alternating with fatigue: preference for active learning styles.
			Emotionally unstable

Recent New Zealand researchers (Neville, 1999; Nolan et al., 2000) have utilized two further taxonomies of emerging adolescent needs to underpin their research. Neville<sup>90</sup> for example developed Dorman's taxonomy of emerging adolescent needs when preparing chapter headings for a book (as yet unpublished) to highlight current middle school practices in a number of New Zealand middle and intermediate schools. This 1984 taxonomy suggested that young adolescents had seven needs. These related to diversity; self-exploration; self-definition; meaningful participation in school and community; physical activity; competence and achievement and for structure and clear limits. These needs closely match those listed in Table One.

By comparison in the Nolan et al. (2000)<sup>91</sup> study these researchers referred to a taxonomy of seven needs developed by Lipsitz, Mizell, Jackson and Austin (1977). These categories of core developmental needs were then further divided into an academic and a social aspect. The former referred to the knowledge and skills emerging adolescents are expected to acquire, while the later referred to the beliefs and values that govern the way in which individuals develop as social beings. These seven needs, Nolan et al. suggested, distinguished emerging adolescence from other developmental stages:

1. A sense of competency and achievement
2. Self exploration and definition
3. Supportive social interaction with peers and adults
4. Challenging and rewarding physical activity

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90. Neville, M. (1999, October). *Case studies of exemplary practice in New Zealand middle schooling*. Paper presented to the annual meeting of the National Middle Schools Association, Orlando: USA.

91. Nolan et al. (2000), p. 4.

5. Meaningful participation in school and community
6. Routine, limits and structure.
7. Diversity of experience.<sup>92</sup>

This taxonomy also closely matched those outlined in Table One. It is noteworthy, then, that there is a high degree of similarity between each of the six taxonomies discussed.

## THE PRACTITIONERS' POINT OF VIEW

The arguments based on biological, psychological, and sociological research — that there is an identifiable group that can be defined as “emerging adolescents”— have been outlined above. Furthermore, the assumption that this age-cohort has specific “needs” that can be better catered for by age-appropriate schools has been explained. However, within the context of this investigation, it is necessary to also establish whether those principals who sought middle school status did so on the grounds of there being an identifiable group called “emerging adolescents.”

### **Interviews of five New Zealand principals**

Interviews were carried out with five current New Zealand intermediate and middle school principals during 2002.<sup>93</sup> This sample consisted of three principals of middle schools, and two intermediate school principals who indicated opposition to middle school development. The decision to use interviews as part of the research methodology in addition to literature searches was influenced by the works of Cohen and Manion (1994, 2000) and Ginsburg (1997). The research

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92. Nolan et al. (2000) p. 4.

93. The five principals and schools were: David Crickmer (Bruce McLaren Intermediate school) — Appendix A; John Crone (Berkley Normal Middle school) — Appendix B; Alan Dennis (Tweedsmuir Junior High School) — Appendix — C; Ann Milne (Clover Park Middle School) — Appendix D; and Trevor Rowse (Northcross Intermediate School) — Appendix E.

interview, as defined by Cannell and Kahn, is “a two-person conversation initiated by the interviewer for the specific purpose of obtaining research-relevant information, and focused on content specified by research objectives of systematic description, prediction or explanation.”<sup>94</sup>

These interviews provided a structured environment in which the researcher could “ascertain the interviewee’s knowledge, values and preferences and what the person thinks and believes.”<sup>95</sup> In the qualitative research terminology these five interviews could be considered to be “focused interviews”<sup>96</sup> because the respondents had been personally involved in the situation on which they were being asked to reflect. The researcher had already developed a series of hypotheses that were used during the interview to elicit further information. A clear interview format was utilised, which ensured that similar questions were asked of each interviewee. The interview focused on the subjective experiences of the practitioners who had been exposed to the situation. For three of the principals this situation was one of leading their school as it changed from an intermediate school to a middle school. For the other two principals it was one of remaining leader of an intermediate school during the late-1990s and early-2000s.

Each interview was structured around a similar set of open-ended questions. These led, on occasion, to situations which “resulted in unexpected or unanticipated answers which [suggested] hitherto unthought-of relationships or

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94. Cohen,L., & Manion,L. (1994). *Research methods in education*. London and New York: Routledge, p.271. Quoting Cannell and Kahn (1968).

95. Cohen & Manion (1994), p. 272.

96. Cohen & Manion (1994), p. 289.

hypotheses.”<sup>97</sup> In this particular series of interviews the role which Māori parents and caregivers had to play in the growth and support of middle schools as outlined by one principal was one example of a new and previously unthought-of hypothesis. While the researcher was aware that the interviews would involve more than a simple transfer of information — the primary intention of the interviews was to attempt to ascertain the personal beliefs and motivations of those being interviewed — it is also important factor that the “transaction inevitably will have bias, which is to be recognized and controlled.”<sup>98</sup>

The caveat outlined in the analysis of historical research data — in chapter 1 — that a researcher must be careful not to apply contemporary understandings to historical debates and discussions, applies equally to the gathering of interview data. While the interview exercise shared many of the features of everyday life “unlike ordinary conversation, the interview is a focused, specialized, and indeed artificial form of discourse.”<sup>99</sup> The researcher needed to be aware that “when the questions become too deep, either side may hold back even when they have the opportunity, the meaning may remain opaque even when stated.”<sup>100</sup> These taped interviews were professionally transcribed and returned to the interviewees for their comments, corrections and additions.

Once the interview data had been analyzed it was obvious to the interviewer that there were omissions, and that clarifications were required that had not been gathered at the time. As Ginsburg shrewdly observed “in a sense you never finish

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97. Cohen & Manion (1994), p. 277.

98. Cohen & Manion (1994), p. 274.

99. Ginsburg, H.P. (1997). *Entering the child's mind*. Columbia University: Cambridge University Press, p. 72.

100. Cohen & Manion (1994), p.275.

the interview. You always wish that you had said something different. You always think of something that you could have said.”<sup>101</sup>

### **The interview participants**

The first group of principals identified in the present study were those who had led their intermediate school during the move to gain a middle school status. Of the seven state middle schools<sup>102</sup> open in 2002, only three had the same principal who had negotiated the change of class from intermediate school during the 1990s.<sup>103</sup> Two of the three principals were visited by the researcher in person. Taped interviews were held with them during May 2002, while the third was interviewed by telephone. The two middle school principals personally interviewed were John Crone (Berkley Normal Middle School) and Ann Milne (Clover Park Middle School), and the third person was Alan Dennis (Tweedsmuir Junior High School).<sup>104</sup> All three principals were able to reveal their personal motivations in pursuing the establishment of a middle school based on their middle school philosophy. They were also able to explain the practical factors and considerations which influenced their institution’s development as a middle school.

In order to gather research data from those intermediate school principals who were opposed to the development of middle schools, for comparative research purposes, the researcher placed an advertisement in the monthly e-mail newsletter

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101. Ginsburg, (1997), p. 158.

102. Raumanga Middle School was restructured in 2001 to become a Full Primary School.

103. Ann Milne of Clover Park Middle School, John Crone of Berkley Normal Middle School, and Alan Dennis of Tweedsmuir Junior High School.

104. The three sets of interview notes form Appendices B, D and C of this thesis respectively. They provide a wealth of information from and about principals who led their intermediate schools through the change-of-class process to achieve middle school status during the 1990s.

of the President of the NZIMSA. The advertisement sought approaches from principals of intermediate schools opposed to the establishment of middle schools on practical or philosophical grounds. The advertisement was sent out to all current intermediate and middle schools members of the NZIMSA (132 schools) via e-mail. Respondents were required to e-mail the researcher and were told from the outset that full confidentiality would be assured.

Two intermediate school principals responded to this advertisement. From their initial contact one principal indicated his opposition to middle schools for pedagogical reasons, and the other principal for local political reasons. The reason for interviewing only those intermediate principals opposed to the middle school movement, rather than searching more widely for examples within the secondary principal arena, was to identify key political and pedagogical themes associated with the intermediate level of schooling. It would be reasonable to assume that many (if not most) secondary principals would be opposed to middle school development for a wide variety of reasons, including practical roll growth reasons, as well as for the different pedagogical considerations related to middle level education.<sup>105</sup>

This researcher, however, wished to identify the barriers that colleagues working in similar situations to the middle school principals (i.e. intermediate school principals) believed curtailed the development of middle schools within New

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105. Nevertheless, not all secondary principals were opposed to the development of middle schools. Russell Bishop (2000), in research into Māori student achievement, interviewed a secondary school principal who stated: "I have tried to negotiate this idea [of developing a middle school] with my local contributing intermediate [school]. I mean I would be quite happy if they went from one to three and we went from four to seven." See Bishop, R., & Richardson, C. (2000). *Collaborative stories from school 2*. Unpublished workshop booklet developed for a Ministry of Education funded research project.

Zealand. Both replies received were from principals of intermediate schools situated in Auckland. The two principals were interviewed in person by the researcher during May 2002.<sup>106</sup> One of them provided additional written material he had prepared prior to the interview. The two interview transcripts are recorded in Appendices A and E of this thesis respectively.

The data available from interviewing these five principals helps to validate the findings obtained from New Zealand and international research literature. Each principal gave case study examples from his or her practical experiences that could be compared by the researcher to the material gained from the literature. These practical examples served the purpose of providing validation of or refuting research literature material. All five principals gave their permission for themselves, and their schools, to be identified in this research.

### **Comments made by the practitioners**

The evidence gained from the interviews conducted with the three middle school principals indicated a high degree of interest in the needs of the students. There was no doubt that a concern to meet students' particular needs was one of the key aspects of their motivation to move towards middle school status. As John Crone explained:

We were looking at environment and environmental features in terms of education, and wanted very much to keep the children in a child- focused environment as opposed to one that was trying

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106. These interviews lasted for about one hour and were tape-recorded. The professionally transcribed, verbatim notes were then returned to the interviewees for their comment, additions and alterations.

to fit the body of the child intellectually into the environment of the adult sooner than they ought.<sup>107</sup>

Alan Dennis suggested that while the existing two-year intermediate school catered for the needs of the emerging adolescent, this work was cut short with the move of students to secondary school. He posed the rhetorical question: “When you read about the needs of emerging adolescents, the 10- to 14-year age-group, with their huge growth spurt physically, why stop this [attention to their needs] in the middle?”<sup>108</sup>

Crone, for his part made a similar criticism about the way in which the transition to secondary school prevents something particularly unique that emerging adolescents, in his opinion, required, from happening:

I guess the constructivist theory approach to learning was where I was deeply rooted, and that 13 and 14 year olds were cut off from that philosophy abruptly by going into a schooling system where everything is predetermined.<sup>109</sup>

Each of the three middle school principals articulated his or her own set of specific “emerging adolescent” needs or characteristics. These included the development of a sense of responsibility and leadership; the desire to cater for individual differences; the provision of one significant adult that these adolescents could relate to; and the need to feel safe and secure at school, while maintaining close relationships with their home. These needs did not exclude the development of identity and, in particular (where appropriate) cultural identity as Māori; or giving students time to develop critical peer group relationships. Allowance was also made for moral development to occur. All of the above are commonly

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107. Crone (2002), p. 5

108. Dennis (2002), p. 2.

109. Crone (2002), p. 4.

occurring emerging adolescent needs and characteristics, as explained in the academic research, and were identified by the interviewees as being age-specific needs for such adolescents. Ann Milne's following remark captured this reality neatly:

I went back to my original thinking about [school] structure- it was the way we were delivering [the curriculum]. As we made a lot of focussed changes, [a] much more integrated curriculum, a more holistic approach, intensive blocks of time, all of those sorts of things, we started to talk about them [the students]<sup>110</sup>

A key concern for these practitioners was to emphasise the importance of a sociological explanation for providing age-appropriate schools for emerging adolescents. Crone explained that, in his opinion, some students who move onto secondary school too soon fail to succeed in and beyond school for the following reasons:

They're lost, they lose some very important years in their growing up, either through pregnancies, through drug overdose, through being kicked out of school, being still in school but performing below their level of capability.<sup>111</sup>

Crone also had in mind a clearly defined end-point to the period of development called "emerging adolescence." He remarked "I don't want any child in our school to think they [sic] can get a driver's license while they're [sic] at school,"<sup>112</sup> or, in other words, that these children could turn 16-years-old and be perceived by the students in the middle school to have achieved a stage of emotionally maturity ahead of others remaining at the school. His concern was that such thinking would bring to his middle school the sort of social pressures that the creation of a middle school had attempted to avoid.

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110. Milne (2002), p.2.

111. Crone (2002), p. 8.

112. Crone (2002), p. 8.

All three interviewees expressed similar concerns that a number of emerging adolescents would not be ready for, or would not cope well within, the present high school structure. For Milne the return to the middle school of bright and academically able Māori students who had become lost in the secondary system worried her especially. Dennis' belief, by comparison, was that little had changed in the methods employed by secondary school teachers, although there was no doubt that significant changes in the needs and aspirations of emerging adolescents had become apparent to many educators in recent years. As with the literature research, it was these sociological concerns relating to the purpose of schools that figured no less prominently than had the biological and psychological theories on these practitioners' thoughts and actions.

Each of the respondents stated that it was the students who were the starting point for them. From this perspective came the research that supported what they had seen from practical experience to be working for this age-group. The question, however, of whether or not middle schools were (and are) the only age appropriate school structure that could meet the needs of emerging adolescents will be explored fully in chapter 5.

## CONCLUSION

The debate concerning whether a specific age-group called "emerging adolescence" existed — as expressed by Lee and Lee (1998) and other researchers — has proven to be a fruitful area of research. This thesis has suggested that proponents of middle schools, during the 1990s, linked emerging adolescent research to middle school discussions. However, emerging adolescence, as a

specific stage in human development, has been a difficult concept to define from the research literature. While biologically each individual moves through a series of similar hormonal and physical changes, these occur at widely varying times from individual to individual. The fact that every individual moves through puberty — and, therefore, adolescence — gives but limited physiological support to the age-specific arguments for middle schools.

Psychologists have presented theories about the significant cognitive changes that occur at much the same time as the biological ones. Recent research suggested that these cognitive changes frequently begin at elementary school, and are rarely completed by the traditional end of the emerging adolescent phase that coincides usually with entry into high school. It has been pointed out in some American research that many adults still do not display the range of cognitive attributes seen in some quarters as belonging to the emerging adolescent phase. The theoretical work of psychologists has, nonetheless, added to the development of effective programmes for middle school aged students. Psychological research also supports the concept of a particular group of students with very special, if not unique, needs.

Sociologists, by comparison, have emphasised the impact that society and its specific constructs have on defining the specific needs and characteristics of this age-group. The economic reality in modern Western society of a longer period of childhood, due largely to the increasing complexity of this society and the lack of unskilled adult work, has been identified by some theorists as the reason for the

creation of the term “emerging adolescence”. Others see this age-group similarly as a human response to changing societal structures.

Of the three schools of thought sociological research appears to lend the strongest support to the development of age-specific schools. Schooling — as a social construct, alongside other constructs such as the media and marketing — has an important role to play in defining (and responding to) a particular stage in human development. While biological and psychological research gives some definition to a stage of human development termed “emerging adolescence,” the sociologists’ contribution has been to examine the possibility of age-specific schooling. As a result, the arguments that there are no significant rites-of-passage in Western culture may be addressed with reference to the development of middle schools. Some of the recent middle school literature has tentatively suggested that the actual physical move to middle school helps to define the moment when adolescence begins.

If this shift in schools does, in fact, provide a rite-of passage then an individual’s physiological development between the ages of 10 and 14 years, creates a need for a specifically responsive educational environment. According to this argument the middle school may, by developing responsive programmes based on such psychological research for this age-group, play an important role in assisting human development. In this connection Chapter 4 will explore the third element of the Lee and Lee (1998) statement, the concept of age-appropriate schools, as a *sociological response* to the biological and psychological developments of this

cohort of students. In so doing, it will investigate the development of such age-appropriate school structures in the international context.

## **Chapter Four**

### **Age-Appropriate School Structures**

#### **INTRODUCTION**

As the previous chapter explained, New Zealand middle school proponents articulated a clear belief that a direct relationship existed between emerging adolescence and the provision of middle schools. Here, it was claimed that the strongest research support for the use of the term “emerging adolescence” existed within the field of sociology. The third question posed in chapter 3, that emerging adolescents should “be catered for entirely within separate three and four-year schools,”<sup>1</sup> will be investigated in the present chapter. This assertion is certainly supported by the original work of Stewart and Nolan (1992) when they stated that:

Three to four year middle schools, involving the grade span from Form 1 to Form 4, be seriously considered as a more appropriate form of educational provision for 10-14 year olds than other existing structural arrangements.<sup>2</sup>

First, this chapter will critique the five current New Zealand schooling structures<sup>3</sup> that cater for emerging adolescents. Comparisons will be made between the Education Review Office (ERO) report (2001) and the comments from the five intermediate and middle school principals interviewed as part of this research, in order to assess the relative effectiveness of the current New Zealand school structures catering for Year 7 and 8 students as emerging adolescents.

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1. Lee & Lee (1998), p. 29.

2. Stewart & Nolan (1992), p. 63.

3. These structures include: Intermediate schools, Full primary schools, Form 1-7 colleges, Composite schools including J1-F7 Area schools and restricted composite schools (middle schools).

Secondly, following this assessment a comparative study of the similarities and differences that exist between similar international institutions catering for this age-group will be undertaken. In particular three international comparisons — that of Australia, Britain, and America — will be explored in greater depth. The Australian case study provides an important comparison because, as with New Zealand, the middle school movement there is a relatively new one. The British example points to the early adoption of middle schooling structures that proved unsustainable over a period of time. It will therefore, provide important insights for New Zealand developments. By comparison, the American case study provides data on the development of the middle school model from an earlier heritage.

The purpose of these international comparisons is to ascertain whether any one existing international school structure effectively meets the perceived needs of emerging adolescents. From this investigation a number of conclusions will be drawn. Finally, the analysis will determine the validity of the third assertion, stated in chapter 3, that middle schools should cater exclusively for the needs of emerging adolescents as advocated by middle school proponents.

## LITERATURE REVIEW

A literature review of current international research into middle schools consisted principally of Australian, British, and American material. The Australian literature (Barratt, 1998, 1999; Cumming, 1998; Cumming & Fleming, 1993; and Lawton, 1998) reflected the work of the National Middle School Project (NMSP) and key

researchers attached to this project. The Australian middle school movement is younger than that of New Zealand and material pre-1996 tended to be of the nature of middle schooling rather than the development of middle schools per se.<sup>4</sup>

The British research material consisted of the work of middle school practitioners (Blyth & Derricott, 1977; Gannon & Whalley, 1975) writing concurrently with the developments taking place. Alternatively, research material consisted of work of educational commentators (Burrows, 1978; Hargreaves, 1986) writing toward the end of the middle school era.

American middle school literature was far more extensive. In recent years, this material had moved away from a rationale of the reform movement of the junior high schools (Eccles et al. 1993) to that of school-based research on effective middle schooling structures, programmes and processes. Literature on early middle school development (Alexander and George, 1981; Lipsitz, 1977, 1980, 1984; NMSA, 1995 and 2000; Valentine and Whitaker, 1997) provided an introduction to the research on whole school structures and programmes for middle schools.

The literature proposing a specific curriculum for middle schools consisted of both theoretical hypothesis and school based research (Beane, 1990a, 1995, 1999; Clark and Clark, 1993; George, 1996; Kite, 1995; Leonie, 1995; Lounsbury and Vars, 1998). This literature argued the effectiveness of providing a specifically responsive curriculum for the emerging adolescent. Literature on the most

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4. This reflects the two-tiered nature of Australian education pre-1998.

effective grade-spans to include in middle schools (Epstein, 1990; Hough, 1997; Lipsitz et al., 1997; and Norton and Lewis, 2000) tended to be among the more contentious of the American research literature.

The impact of leadership — of the principal in particular, (Deal & Peterson, 1990; Elmore 2000; Hipp, 1997 — and of teachers (Fry, 1994; Moss and Fuller, 2000) had also been found to be key determiners in student engagement and success at the middle school level. Emerging adolescent engagement in their learning (Baenen 1991a, 1991b; Erb, 1997; Kirkpatrick, 1997; and Wasserstein, 1995), provided a key point of difference with other structures of schooling.

Extensive New Zealand research literature published since the early-1990s was of both a general theoretical nature and as specific school based research. The first middle school research literature — that of Stewart and Nolan (1992) — has been discussed previously in chapter 2, as has some of the literature of the New Zealand Intermediate and Middle Schools Association (NZIMSA) (Davidson et al., 1995; NZIMSA, 1995, 1996a, 1996b; and Thwaites, 1997). Other literature, of a more general nature, (Hinchco, 1997-98; Kerr, 1996; and Neville, 1999, 2000) tended to be supportive of the development of the concept of middle schools in New Zealand. The work of Nolan & Brown (2001, 2002) attempted to provide the clearest account of a uniquely New Zealand middle school structure. The articles of Lee & Lee (1996, 1998, and 1999) however sounded words of caution for the new movement. Nonetheless, recent work by Bishop et al. (2003) on Year 9 and

10 Māori student achievements and Education Review Office (ERO) reports<sup>5</sup> (2001, 2003) suggest an increased relevance for middle schools in the New Zealand context, in this new century.

## THE NEW ZEALAND SITUATION

Although the age-span covered by the term “emerging adolescents” varies between researchers, there exists a general understanding of an age-span of 10-years to 14-years<sup>6</sup> (see chapter 3). While this age-span does not sit comfortably with current New Zealand school structures it provides a valid starting point for investigating the claims of middle schools. Generally, New Zealand 10-year-olds tend to be in their final year of primary school; Year 6. Fourteen-year-olds tend to be in Year 10, the secondary school year preceding national examinations; either School Certificate or, more recently, its successor, the first year (Level One) of the National Certificate of Educational Achievement (NCEA). The use of this age-range therefore implies, in the New Zealand setting, a span of three different schooling institutions; primary, intermediate, and secondary schools. To some degree this confusion over age-ranges and grade-spans has added to the problematic nature of establishing middle schools in New Zealand. Considering only the middle years of the age-span outlined above (Years 7 and 8) — prior to any debate concerning the most ideal middle school range — will enable comparisons to be made of the various school structures in New Zealand that cater

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5 . Education Review Office. (2003, June). *Students in Years 9 and 10*. Wellington: Learning Media.

6. This is the age-span adopted by the National Middle Schools’ Association (NMSA) and the New Zealand Association of Intermediate and Middle Schools (NZAIMS). Various theorists outline a range of ages but the majority of middle school writers (Lipsitz, 1977, 1980, 1984; Epstein, 1990, among others) tend to have reached consensus on this age-span. This was also the age-span articulated in the Stewart and Nolan Report (1992).

for this age-group. Further discussion on the most appropriate grade-spans for middle schools is included in chapter 5.

The ERO report, *Students in Years 7 and 8*,<sup>7</sup> referred to five different state and state integrated schooling structures that cater for these two years.<sup>8</sup> These schooling arrangements discussed: Intermediate schools (Years 7 and 8); Full primary schools (those that retained Year 7 and 8 students); Year 7 to 15 secondary schools (Form 1 to 7 colleges); Composite schools (including area schools) catering for Years 1 to 15; and Restricted composite schools (three- or four-year middle schools). The ERO report (2001) stated that “the current diversity in schooling arrangements in New Zealand is unique internationally,”<sup>9</sup> but it is a statement that is at odds with the American situation. There a national survey found that schools that enrolled seventh-grade students included about 30 different grade-spans.<sup>10</sup> It is unclear whether ERO was suggesting that New Zealand is unique because of the lack of a range of schools to cater for this age-group. Nolan and Brown (2002), for their part, have claimed that internationally, educationists would consider five different structures for this age-group as being a relatively small number.<sup>11</sup>

Furthermore, ERO stated that “New Zealand is the only country in which primary schooling effectively continues until the age of 13.”<sup>12</sup> This claim ignores current

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7. Education Review Office. (2001). *Students in Years 7 and 8*. Wellington: Author.

8. ERO omitted from the report a further two schooling options, home schooling and correspondence school, as they sought to compare different structures of schooling in this report.

9. Education Review Office (2001), p. 49.

10. Epstein, J. (1990). What matters in the middle grades: Grade spans or practices. *Phi Delta Kappan*, 14 (25), 438.

11. Nolan, C.J.P., & Brown, M. (2002). The fight for middle school education in New Zealand. *Middle School Journal*, 33 (4), 36.

12. Education Review Office (2001), p. 6.

schooling provisions from Mexico<sup>13</sup> and Japan<sup>14</sup>, and historic research on the English model of primary middle schools.<sup>15</sup> These three countries offer very similar middle school provisions based on primary schooling models to New Zealand. The educational provisions of these three nations will be covered in greater depth later. Clearly the ERO report needs to be read carefully, for some of its generalisations are not substantiated by research. However, the ERO report reached a valuable conclusion, with regard to the use of international research data, when it stated that “international findings need to be adapted to the New Zealand context because of differences in the structures of schooling.”<sup>16</sup>

Before investigating school structures internationally it is necessary to examine ERO’s analysis of the five school structures for Year 7 and 8. This ERO report provided important data on the relative effectiveness of different school structures, albeit from the perspective of this review agency. The findings and recommendations of the report will also be compared with the comments made by the five intermediate and middle school principals interviewed as part of this research.

## **Intermediate Schools**

Intermediate schools in 2000 accounted for 52%<sup>17</sup> of Year 7 and 8 students enrolled in state education in New Zealand. The ERO report boldly asserted that intermediate schools effectively catered for this age-group of students by making

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13. Levinson, B.A. (1999). Una etapa siempre dificil: Concepts of adolescence and secondary education in Mexico. *Comparative Education Review*, 43 (2), 129-161.

14. Cummings, W.K. (1999). The institutions of education: Compare, compare, compare. *Comparative Education Review*, 43 (4), 413-437.

15. Gannon, T., & Whalley, A. (1975). *Middle Schools*. London: Heinemann Educational Books.

16. Education Review Office (2001), p. 15.

17. Education Review Office (2001), p. 4. This percentage excluded those students enrolled in middle schools who prior to 1995 would have been included in the intermediate school figures.

provision for exploratory work based in homeroom situations and by having a high degree of subject specialisation. It was thought that those intermediate schools with a clear philosophy for educating this age-group generally provided a high quality of education.<sup>18</sup> In particular, ERO emphasised that intermediate schools were in a position to direct all of their school resources solely for these students, unlike any of the other school structures reviewed.

ERO commented however, that the majority of intermediate schools “take an approach to curriculum organization and delivery that is similar to the style of education provided at full primary school.”<sup>19</sup> A comment was made that intermediate schools — despite their having been part of the educational environment for 80 years — had not developed a form of schooling that was significantly different from some of the other structures that exist for this age-group.<sup>20</sup>

ERO expressed concern that intermediate schools provided a very short period of education for students. The reality of two school transitions in two years, from primary to intermediate and then to secondary, while catered for by good<sup>21</sup> intermediates was frequently accompanied by reduced educational performance in less effective intermediate schools, ERO commented.<sup>22</sup> All of the principals interviewed also remarked on the disadvantage of having two-year intermediate schools. For example, Alan Dennis (Principal Tweedsmuir Junior High School) commented: “when you read about emerging adolescents, the 10 to 14 age-group,

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18. Education Review Office (2001), p. 28.

19. Education Review Office (2001), p. 29.

20. Education Review Office (2001), p. 29.

21. Education Review Office (2001), p. 29.

22. Education Review Office (2001), p. 29.

with their huge growth spurt physically, why stop this [catering for their specific needs]in the middle?”<sup>23</sup>

Nevertheless, each of the five principals interviewed supported the retention of the intermediate school structure. This was probably not surprising, given their experience with this sector. Trevor Rowse (principal of Northcross Intermediate School) commented on the energy and vibrancy of intermediate schools:

All of a sudden there were all of these people driving and creating school events, because all of the children were at the same level; productions, speech competitions, everybody in the school seemed to be involved in some way to develop these things.<sup>24</sup>

In a similar vein to ERO, Rowse also observed “the two years of intermediate have the full focus of the total staff and facilities.”<sup>25</sup>

### **Full Primary Schools**

Full primary schools, (institutions that continue to the end of Year 8), accounted for 33% of the Year 7 and 8 enrolments in 2000.<sup>26</sup> ERO report was generally satisfied with these schools, reporting that while half of the full primary schools tended to be found in small rural communities, these accounted for only 24% of Year 7 and 8 students. The remaining 76% of these students attended a smaller number of larger urban-based full primary schools.<sup>27</sup> As with each of the structures reviewed those schools that ERO considered to be effective schools —

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23. Dennis (2002), p. 2.

24. Rowse (2002), p. 2.

25. Rowse (2002), p. 3.

26. Education Review Office (2001), p.4.

27. Education Review Office (2001), p.30.

across all aspects of school management — tended to also run high quality Year 7 and 8 programmes.

ERO believed, though, that the full primary structure tended to offer a less extensive range of specialist subjects and “tend [ed] not to provide the same range of student support strategies”<sup>28</sup> as were found in other types of schools for this age-group. Furthermore, they recommended that teachers in full primary schools needed to pay more attention to managing the transition of students to the next level of schooling. The principals interviewed in the present study tended to mirror these comments: Rowse, for instance, stated that he found his time in full primaries boring and lacking challenge. He was critical that in these schools teachers just looked after their own age-group, and he claimed that “the teacher in the new entrant class doesn’t do anything [to help develop] the whole school concept.”<sup>29</sup>

While ERO noted that full primary schools allowed Year 7 and 8 students’ leadership opportunities,<sup>30</sup> Dennis was concerned that emerging adolescents needed more opportunities to develop what he considered to be real leadership skills. In his opinion, these leadership skills could be developed only by leading one’s own peer group. At his school (Tweedsmuir Junior High School), Year 7 and 8 students have “[the] opportunity to grasp responsibilities without little children about, not reading to the little kids, not being pie monitors.”<sup>31</sup> These activities did not provide leadership opportunities, in Dennis’view.

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28. Education Review Office (2001), p.36.

29. Rowse (2002), pp. 2-3.

30. Education Review Office (2001), p.34.

31. Dennis (2002), p.2.

Nolan and Brown (2001) reached a similar conclusion. They stated that “little evidence can be found to support the inclusion of Year 7 and 8 students in primary schools,”<sup>32</sup> because generally, emerging adolescents are influenced more by their peers than by their parents. Therefore, Nolan and Brown maintained these students need a school culture that was responsive to them as a group, one where their developing academic orientation was supported by a more demanding learning environment than that provided for in schools other than the largest urban full primaries.

### **Year 7 to 15 Secondary Schools**

The third largest enrolment of Year 7 and 8 students (10%) occurred in Year 7 to 15 secondary schools. These schools consisted mainly of the Form 1 to 7 colleges which began to be formed immediately prior to the Currie Commission report of 1962. In all there were 88 of these secondary schools<sup>33</sup> found most commonly in smaller towns or as state integrated schools.

The year 7-15 structure was the most criticized, both by ERO and the five principals interviewed. The former was concerned that teachers in these institutions needed to find a way “to accommodate the needs of young adolescents within a secondary school environment.”<sup>34</sup> Consequently, the Year 7-15 school teachers were urged to “consider [introducing] a more integrated curriculum and [providing] greater stability in their educational environment.”<sup>35</sup> Furthermore,

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32. Nolan, C. J. P., & Brown, M. (2001). Educating students in the middle: Getting it right with or without middle schools. *SET: Research information for teachers*, 3, pp. 25-28.

33. Education Review Office (2001), p. 4. This report sets out the claim that there were 88 of these schools as of 1 July 2000.

34. Education Review Office (2001), p. 39.

35. Education Review Office (2001), p. 39.

ERO was concerned with the provision of support for students in these schools. Their final recommendation was noteworthy — considering that these students were already in a secondary environment — when ERO suggested that these institutions needed to “manage support of young adolescents and their transition into the secondary environment,”<sup>36</sup> to a greater extent than they were currently.

Three of the principals interviewed commented directly on the Year 7-15 format. For each of them the secondary school model was the least successful structure for catering for the needs of Year 7 and 8 students. While the interviewees’ remarks referred mainly to Year 9 to 13 secondary schools, they were generally applicable to those Year 7 to 15 intuitions that followed a purely secondary school model of administration and curriculum delivery. For John Crone (principal of Berkley Normal Middle School) the issue was one of a lack of individualisation and support for students. He was concerned with what may occur in the secondary school environment particularly when “I know about the bullying and the impersonalisation and so on[in secondary schools].”<sup>37</sup>

Alan Dennis reflected on a number of addresses he had been asked to give to high schools in the Invercargill region explaining his reservations, and the concerns of his parent community, about a secondary school style of education. The individual child and the lack of support was a paramount issue for him. Dennis lamented that in the secondary school environment “students who enjoyed school [were] suddenly turned off because, ‘the teacher hates me’ or ‘I don’t understand what

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36. Education Review Office (2001), p. 39.

37. Crone (2002), p. 9.

the teacher is saying to me'.”<sup>38</sup> There were further deficiencies with the present secondary school model. Both Crone and Dennis were critical of secondary school timetables and the lack of flexibility of timetabling in these schools. The former asked: ‘but tell me how often a high school’s timetable is changed markedly to meet the needs of its clients?’<sup>39</sup> Dennis was also opposed to the rigid timetabling of subjects, what he labelled as ‘the ‘ring and run’ of high school periods. With a five minute break between each of seven periods in a day, times five days a week, times forty weeks of the year, I tell parents it mounts up.’<sup>40</sup> The most outspoken critic of the secondary school model among the principals interviewed was Trevor Rowse. He claimed that “anything is better than a college education for these kids. I don’t care whether it is intermediate or a middle school or any other alternative.”<sup>41</sup> His comments were influenced by the fact that within Rowse’s school community (North Shore, Auckland) there were a number of different secondary school structures, including at least two Year 7 to 15 secondary schools,<sup>42</sup> none of which he considered catered effectively for this age-group.

### **Composite Schools**

The fourth schooling structure, the composite school, catered for New Entrants to Form 7 (Years 1 to 15) on the one site. This label covered a range of schools including area schools, integrated composite schools, some Kura Kaupapa Māori, and Southern Cross Campus.<sup>43</sup> Composite schools enrolled approximately 3% of

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38. Dennis (2002), p. 2.

39. Crone (2002), p. 9.

40. Dennis (2002), p. 5.

41. Rowse (2002), p. 7.

42. Rosmini and Carmel Colleges.

43. Southern Cross Campus consists of three schools situated on the one site, in Mangere, South Auckland. The three schools include a primary school, an intermediate school, and a secondary school. The purpose of this one-site school is to provide seamless education covering the compulsory years of schooling.

Year 7 and 8 students in 2000.<sup>44</sup> While ERO's comments on these schools were similar to those they made about Form 1 to 7 schools — in particular the need to consider different support mechanisms for the different age-groups — these schools were held to be relatively successful.

Among those principals interviewed only one criticised this form of schooling, possibly because of the small number of these schools and a consequent lack of knowledge about them. (The one principal who disliked the composite model of schooling had one composite institution in his area.)<sup>45</sup> Rowse commented:

I'm arguing against schools that have got Primer one to Form 7, or Form 1 to 7, [because] they do not have the specific facilities...They [the students] cannot use the Gym because a School Certificate class is using it and that's been my observation with those schools.<sup>46</sup>

Mirroring remarks from ERO, the lack of specific, targeted facilities and resources for this age-group was a concern for Rowse.

### **Restricted composite schools**

The fifth type of school discussed in the ERO report was the middle school, which catered for less than 2% of the Year 7 and 8 school population in 2000. ERO concluded that because of the lack of numbers of such schools and the short time these schools had been open little could be ascertained about the effectiveness of these schools in catering for the educational needs of their students. In ERO's

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44. Education Review Office (2001), p.4.

45. Kristin School, Albany.

46. Rowse (2002), p. 3.

view “schools with high quality curriculum management and governance systems are likely to manage the change of class [to middle school] successfully.”<sup>47</sup>

From this overview of the current school structures relating to New Zealand Year 7 and 8 students based on the 2001 ERO report, there is little evidence to suggest that any one particular school structure was more effective than another. Yet ERO maintained that some structures were less effective than others in meeting the perceived needs of the emerging adolescent and that consideration needed to be given to these. They concluded: “the quality of practices rather than structures... determined how effectively schools meet the needs of their Years 7 and 8 students.”<sup>48</sup> This issue will be explored further in chapter 5. Furthermore, the report commented that:

The education of students in Years 7 and 8 cannot be considered in isolation from that of students in Years 9 and 10. These years have been characterised as the “forgotten years” in the New Zealand education system. The future role of middle schools in New Zealand needs to be considered further in the light of the needs of all students from years 7 to 10.<sup>49</sup>

It is possible to assume from this conclusion that the lack of a model of an effective New Zealand school structure for Years 7 to 10 may have owed more to the methodology<sup>50</sup> employed by ERO than the effectiveness of current middle schools. It may be that a new model (or the most recent new model, the middle school) may offer a better opportunity to research a school structure that best caters for emerging adolescent needs, than the other schooling structures currently

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47. Education Review Office (2001), p. 43.

48. Education Review Office (2001), p. 49.

49. Education Review Office (2001), p. 51.

50. The methodology used included a summation of recent ERO reports of schools in each of these categories. In addition comparative research was undertaken comparing a selection of international middle school case studies to the New Zealand situation. A degree of quantitative data was also provided from government educational statistics.

operating in New Zealand. With a lack of clear evidence from one governmental agency with responsibilities regarding the compulsory schooling sector (ERO) perhaps the international scene may offer stronger evidence to support the effectiveness of one school structure, in particular

## THE INTERNATIONAL COMMUNITY

Any analysis of school structures should focus on those pedagogical issues related to improving students' learning. A key purpose of schooling is to enhance the opportunity for learning for the individuals that the structure serves. Whenever new structures of schooling, such as middle schools, are broached the debate often extends further than merely examining how the new structure may or may not improve the educational outcomes for individuals. This debate frequently ranges across a much wider platform of issues such as, historical precedents, international comparisons, and competition for students with other vested educational interest groups. Some of these wider issues have begun to be addressed earlier in this thesis. The purpose of this chapter is to explore a number of international perspectives on school structures for emerging adolescents and to draw comparisons from these settings where possible to ascertain their possible relevance to the New Zealand educational environment.

As William Cummings<sup>51</sup> argued, there is much to be gained from comparing various institutions across nations. Such comparisons provide an opportunity to gain an understanding of which structures may have the greatest positive impact on student learning. The following account, will examine educational institutions

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51. Cummings, W. K. (1999). The institutions of education, compare, compare, compare! *Comparative Education Review*, 43 (4), 413-437.

through case studies of a number of countries that cater specifically for the perceived needs of the emerging adolescent.

An American researcher, Ruby Takanishi (1993) has claimed that “a paradigm shift has occurred in the last few years concerning how we view adolescents.”<sup>52</sup> In particular adolescent behaviour has been profoundly shaped by the way adults have organised adolescents’ educational and social experiences, as discussed in chapter 3. If the manner in which school structures are organised for emerging adolescents influences their development and behaviour educationists need to ensure that adolescents are provided with the best educational experience based on research findings. A particular school structure that may have served a country well in previous decades might need to be abandoned or updated to cater for the needs of adolescents entering a technological society significantly different from one that existed even ten years ago.

This concern with preparing youth for a technologically changing society has been a long-running preoccupation, particularly among Western nations. A UNESCO world survey drew the conclusion that:

In spite of the variety, it is never-the-less possible to discern some trends of change that are common to many countries. They arise out of the general tendency towards lengthening the period of schooling, made necessary by the technological changes taking place in societies at all levels of development.<sup>53</sup>

One such trend has been the identification of a group of students, variously identified as the young adolescent, the emerging adolescent, or the young adult. In

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52. Takanishi, R. (1993). Changing views of adolescence in contemporary society. *Teachers College Record*, 94 (3), p. 459.

53. Unesco (1971). *World Survey of Education, Volume V. Educational Policy, legislation and administration*. Paris: UNESCO, 29-32.

each society discussed by the following, these terms have been widely used although, as explained previously, their origins and justifications have varied greatly between countries and cultures and across time.

## INTERNATIONAL COMPARISONS

The concept of an age-appropriate school structure for emerging adolescents can be identified across a wide cross-section of nations in the global environment. The first set of nation case studies briefly outlines a few examples of the global extent of this type of schooling provision. Countries as diverse as Mexico, Japan, China, France, Italy and Germany have each provided for specific schools for emerging adolescents. These case studies are followed by a closer examination of middle schooling provisions in three Western nations, Australia, England and the United States of America.

### **Mexico**

As a general observation, many countries provide stand-alone schools to cater for this age-group. In Mexico, the notion of emerging adolescence as a stage before secondary school has been used frequently since 1923 when the first *secundaria* were established.<sup>54</sup> *Secundaria* cater for the post-primary years, Grades 7 to 9. For the last 80 years the Mexican education system has provided for a continuation of the “basic” primary studies while also emphasising a strong vocational component in the *secundaria*. Initially, these schools were established in rural areas to provide optional vocational schooling. When they began appearing in urban areas

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54. Levinson, B.A. (1999). Una etapa siempre difícil: Concepts of adolescence and secondary education in Mexico. *Comparative Education Review*, 43 (2), 129-161.

the purpose of the *secundaria* has been to support students in preparing for their secondary studies. As Levinson observed:

Typically, only those who envisioned a professional career continued beyond primary school, and they used the *secundaria* as a stepping-stone to further studies in urban areas, particularly at a college linked *preparatoria*.<sup>55</sup>

Since 1993 secondary education has been compulsory in Mexico. Nevertheless, the *secundaria* have continued to fulfil the two related, but distinct, roles of preparing youth vocationally for the labour market and academically for professional studies. These two roles recur throughout the literature on emerging adolescents, across different countries, involving related but sometimes conflicting philosophies and objectives underpinning middle schools and middle school programmes. (This conflict of philosophies, as it arose in the New Zealand situation with the creation of intermediate schools, has been described previously in chapter 1.)

## Europe

In some European countries the middle-years schools are staffed solely by secondary trained teachers. Middle schools have been operating in the German schooling system since 1872. Under the *General School Regulations* of that year intermediate-level institutions were directed toward artisan, small-scale merchant, and trades classes who could afford to proceed beyond the elementary school but who were unlikely to enter secondary schools per se.<sup>56</sup> The German schooling structure therefore, has three levels: elementary school (grades 1 to 4), lower

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55. Levinson (1999), p.131.

56. Butts, R.F. (1955). *A cultural history of western education: Its social and intellectual foundations*. New York: McGraw-Hill (2<sup>nd</sup> Edition), pp. 360-361.

secondary (grades 5 to 9) the *Mittelschule*<sup>57</sup> and upper secondary (grades 11 to 13).<sup>58</sup> Similarly in Italy the *scuola media statale* is a lower secondary school for pre-adolescents, aged between 11 and 14-years-old. This institution was introduced in 1962 as part of a governmental policy to provide equality of educational opportunity for all citizens within an industrial democracy.<sup>59</sup>

In France a similar four-year lower secondary school exists as a *college*, although UNESCO (1971) noted that after recent reforms “a period of junior secondary school education [is] spent in unspecialised schools that provide a broad general education for all [French] pupils.”<sup>60</sup> In Finland by comparison, a three-year period at “civic schools” follows the six-year basic primary schooling that all students receive.

### **China and Japan**

In China the term “middle school” predates the communist revolution (1937).<sup>61</sup> It refers to an institution that is intermediate between primary school and higher education, one that had some vocational aspects in its programme. In other Eastern countries, such as Japan, middle school staff are trained elementary (primary) school teachers. As Cummings reported:

The organization of Japanese middle and high schools tend to follow from the primary school; at all three levels there is [a] common curriculum with no electives, and students stay in the homeroom classrooms throughout the day, while teachers move from class to class.<sup>62</sup>

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57. Blyth, W.A.L. and Derricott, R. (1977). *The social significance of middle schools* London: B.T. Batsford, p.5. The Mittelschule caters for the lower secondary grades (5-9), with the provision of secondary trained teachers.

58. Education Review Office (2001), p. 54.

59. Blyth & Derricott (1977), p.5.

60. Unesco (1971), p.30.

61. Blyth & Derricott (1977), p.27.

62. Cummings (1999), p. 427.

Cummings believed that one of the reasons why Japanese middle school students scored so well in international assessments was the Japanese focus on the Japanese primary system — unlike the American system with its orientation toward secondary school.<sup>63</sup> Another researcher into Japanese schooling, Gerald LeTendre, noted that within Japanese culture adolescence is not seen to involve a period of poor behaviour. He reported: “Teachers there believe that, given proper routines, young adolescents can behave appropriately and organize themselves quite effectively in groups.”<sup>64</sup> Such observations brings the notion of adolescence as a period of “storm and stress” into sharp contrast, as was discussed in chapter 3.

From this brief introduction to a range of international provisions for emerging adolescents, the conclusion can be reached that the offering of some form of middle schooling — for a period of three or four-years — is common to a number of countries within the international educational community. New Zealand is unique because of the two-year duration of its intermediate school, not because of the number of different school structures catering for this age-group. Little international agreement has been reached, however, about whether these “middle schools” should be staffed by primary or secondary trained teachers, or whether they should be three-years or four-years in duration, or that their programme should principally be exploratory or encourage early subject specialisation.

To make a more effective comparison between the various forms of middle schooling provided internationally, more examples are required. Australia,

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63. Cummings (1999), p. 427.

64. LeTendre, G. (2001). Learning Japanese. *Teacher Magazine*, p. 2.

England, and the United States of America, have been chosen for this purpose. The former provides a particularly relevant international comparison, because, as with New Zealand, the middle school movement there is a relatively new one. The English study is of a country that embraced the concept of middle schooling relatively quickly but without sufficient thought to the infrastructural changes such a development would necessitate.<sup>65</sup> Hence, apart from a small number of counties, the middle school concept has all but died in recent years in England. New Zealand faces similar infrastructural issues, and educators will need to take careful account of the English educational experience. The American study of change from a junior high to a middle school model probably resembles the New Zealand situation most closely.

## Australia

Until recently (1997) the Australian compulsory education system had been two-tier, whereby elementary (primary) schooling was simply followed by secondary schooling.<sup>66</sup> During the early 1990s recognition of emerging adolescents as an identifiable group became topical in the Australian educational community. In 1996, Dr. David Kemp (the Commonwealth Minister for Schools, Vocational Education and Training) launched the National Middle Schooling Project (NMSP).<sup>67</sup> The expressed purpose of this project was to investigate the specific needs of young adolescents and to erect “bridges” to better cater for their

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65. Hargreaves, A. (1986). *Two cultures of schooling: The case for middle schools*. London: Falmer Press.

66. Also, the private school system, most commonly run by various church denominations, was strongly represented in Australian education.

67. This project followed the 1991-1992 Junior Secondary Review of the Education Department of South Australia and the May 15-23, 1993, National Conference on Middle Schooling.

requirements at the conventional primary/ secondary school divide.<sup>68</sup> In other words the present two-tier school structure was not to be questioned.

The aims of the NMSP project, as outlined by Kemp, were three-fold: to generate a “map” of middle schooling activity as it existed currently across Australia and to provide professional development material that would support teachers and administrators working with emerging adolescents. The third aim was to produce a set of common principles and strategies collaboratively for middle schooling in Australia.<sup>69</sup> But events overtook the intention of the project. By late-1998 some Australian educationists were commenting that the time was right to establish purpose-built middle schools. For example, David Lawton suggested:

Instead of waiting for students to ‘half grow up’, then change schools at vulnerable times of their lives (from primary to secondary), it seems [to make] more sense to establish a specialised school setting within which to grow through puberty, to mature and become young adults.<sup>70</sup>

Lawton’s arguments for establishing a separate middle school structure included listing both the positive attributes that young adolescents require in a purpose-built school for their age-group and the negative characteristics for this age-group that, in his opinion, arose within the present school structures. He maintained that young adolescents ought to have an extended peer-group within which they could form meaningful networks and could discuss issues affecting them. Middle schools, Lawton declared, could provide specialised support staff skilled in working with adolescents, who could respond to the adolescents’ unique set of

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65.Barratt, R. (1998) *Shaping middle schooling in Australia: A report of the National Middle Schooling Project*. Canberra: Australian Curriculum Studies Association.

69. Barratt (1998), p. 5.

70. Lawton, D. (1998). The need to overcome structural implications. *Education Horizons*, 5 (1),14.

needs. These schools should not be established within a secondary school, however, because the secondary school model would tend to prevail. Lawton concluded:

Middle schooling is all about concentrating what many upper primary and junior secondary teachers already do well. Combining staff, curriculum, methodologies and school structures in the middle schooling years is a logical solution to the problems caused by primary and secondary settings being geographically separate.<sup>71</sup>

When middle schools were being proposed in some quarters in Australia from the late-1990s there was no intermediate school system or tradition in that country. Accordingly, the move to set up stand-alone middle schools was unencumbered by such a tradition, although it represented a figurative step into the unknown. The first purpose-built middle school was built in Australia in 1998. By 2001 a number of purpose-built middle schools had been completed, both in Queensland and in Western Australia (Perth). While some states (for example, South Australia) continued to develop resources for middle schooling topics within the existing secondary school structure the pressure to move to stand-alone schools, is far greater than it was five years ago when the NMSP was first established.

## **England**

Middle schools are not a recent phenomenon in England, for such a structure was first suggested as early as 1858 by the Committee of Council on Education.<sup>72</sup>

Nearly 70 years later the Hadow Report, *The Education of the Adolescent*, (1926) referred to these schools. One of the recommendations of the Hadow Committee<sup>73</sup>

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71. Lawton (1998), p.18.

72. Ward (2001), p. 19.

73. The Hadow Committee was a consultative committee with sir William Hadow (Vice-Chancellor Sheffield University) as its chairperson. The report was published in London, issued by the English Board of Education.

was that while elementary schooling was to cover the ages 5 to 11-years of age, children should then be able to finish their formal education over a three-year period (to the age of 14-years) in a middle school or move to a secondary school for further education.<sup>74</sup> Following the release of the Hadow Report a number of counties experimented with a middle school structure, with institutions that were almost always staffed by secondary trained teachers.

English middle schools gained favour in the 1964 Education Act following a paper written by Sir Alec Clegg, Chief Education Officer of the county of West Riding. This paper (published in 1963) outlined an educational structure for the county that would see three distinct schools — 5-to-9 years, 9-to-13 years and 13-to-18 years — established.<sup>75</sup> The 1964 Education Act allowed the Secretary of State to assign middle schools as new schools to either the primary or the secondary sector. This statute provided the basis for the classification “deemed primary” or “deemed secondary” of English middle schools. As two of the very first middle school principals, Tom Gannon and Alan Whalley, have commented, “middle schools were meant to expedite the end of the eleven-plus [examination], and have certainly done so in the areas in which they have been established.”<sup>76</sup> The “eleven-plus examination” was hugely important in England. This age marked the most appropriate age for transition from a primary to a secondary school environment, according to the view of the Hadow Committee.

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74. Ward (2001), p. 19.

75. Blyth & Derricott (1977), p.15.

76. Gannon & Whalley (1975), p.5.

The rationale for middle schools contained in the West Riding proposal was echoed three years later in the Plowden Report, (1967),<sup>77</sup> which recommended:

At the age of 9+ at the latest pupils would pass to the Middle school which would continue the work of the Primary school and introduce them to the specialisation which is a proper feature of a good Secondary course but which over vigorously applied can do so much harm to the younger age groups and slower learners.<sup>78</sup>

While the Report proposed that all middle schools should be established as Year 8 to 12 schools and classified as *primary* (thereby making 13-years the desirable age to transfer to secondary education) this recommendation was never fully adopted. For this reason, as Blyth and Derricott have suggested, middle schools never became the subject of national, political debate. Instead they remained under the jurisdiction of Local Education Authorities (LEAs).

The 1964 Education Act was followed in July 1965 by the Department of Education and Science (DES) Circular No. 10/65 that offered six alternatives to educational authorities for them to restructure their schooling systems to eliminate the eleven-plus selection process. One proposal was to adopt a three-tier system of “first”, “middle” and “upper” schools for the following reasons:

[Firstly] upper schools with a 13 to 18 [age] range were smaller and less costly than 11 to 18 schools, and secondly that existing secondary schools which were too small for use as comprehensive upper schools could be converted to middle school use.<sup>79</sup>

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77. Central Advisory Council for Education. (1967). *Children and their primary schools*. London: Her Majesty's Stationery Office (HMSO).

78. Plowden Report (1967), p. 117 paragraph 386; recommendations (a) and (b) quoted in Ward (2001), p.23.

79. Burrows, J. (1978). *The middle school: High road or dead end*. London: The Woburn Press, p.18.

When discussing which of the alternatives outlined in the DES circular to pursue, the LEAs usually sought advice from a special committee or working party that was established for that purpose.<sup>80</sup> Issues such as the age at which students should transfer from primary to middle school and the degree to which a child-centred approach should be balanced with subject specialisation figured prominently in discussions. These discussions were not confined to England however, as Richard Ward demonstrated “many of the issues raised by such working parties share common features associated with the establishment of middle schools in other countries, especially the US and New Zealand.”<sup>81</sup>

In 1975 the Secretary of State for Education declared that all Year 8 to 12 middle schools were now to be deemed primary. (Almost all (97%) Year 9 to 13 schools had already been classified as secondary.) Because the cost of establishing a primary middle school was much less, due to less generous staffing and capitation allowances, then local educational authorities were more likely to form middle schools under the “primary” classification. The growth of middle schools during the 1970s, however, was quite spectacular. In 1968 few middle schools existed in England yet by 1982 over 1,413 of such schools had been established.<sup>82</sup> The English academic, Andy Hargreaves has suggested, that during the 1970s supporters of English middle schools were actively seeking an ideology for their existence. He noted that much of the earlier English literature supporting these schools rested, not surprisingly, on the developmental theories of Piaget. As a result middle schools represented:

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80 . Ward (2001), p.24

81. Ward (2001), p. 24.

82. Hargreaves (1986), p. 2.

A zone of transition where children move from the concrete stages of operations to the formal (abstract) stage, and [where they] begin to develop powers of judgement and discernment, along with the quest for self-discovery.<sup>83</sup>

Owing to the rapid growth of middle schools in the early 1970s the inherent tensions created with the relatively sudden establishment of a third-tier within the English system have largely been ignored. One of the strongest tensions, Hargreaves explained, was one that existed over the professionalism of the teaching staff. Among primary trained teachers, a strong primary school tradition was evident. This was grounded in one of three key pedagogical approaches:

1. The developmental or progressive tradition.
2. The elementary school tradition of teaching basic skills of literacy and numeracy.
3. The preparatory school tradition of educating students for entry to public schools.<sup>84</sup>

Throughout the 1970s these primary trained teachers were working in middle schools alongside secondary trained teachers who had equally strong and conflicting traditions. In Hargreaves' view secondary teacher traditions were also of three broad types: (a) An *academic* tradition, with a premium placed on acquiring knowledge, (b) An *elementary* tradition, with emphasis on gaining a vocational education, and (c) The *developmental* tradition of independent, "public" schools.<sup>85</sup> Because these diverse and conflicting teaching traditions met in the middle school, Hargreaves reasoned that this school structure was

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83. Hargreaves (1986), p.5.

84. Hargreaves, (1986).

85. Hargreaves, (1986).

fundamentally flawed from the outset.<sup>86</sup> Gannon and Whalley<sup>87</sup> likewise explored this staffing issue, albeit from a somewhat more pragmatic viewpoint. In noting different conditions of employment and status between primary and secondary teachers, these researchers claimed that the difference in status among secondary teachers (according to the subjects they taught) was an additional difficulty. Furthermore, each group of teachers brought to their teaching differing expectations of students at either end of the middle school age-span. To this end Hargreaves perceptively concluded:

Judging by the case study evidence, it seems that the teachers who came to dominate the upper years of the middle school had their career roots in secondary modern schools or the scholarship streams of primary schools... These teachers were, by and large, not middle school zealots, but people simply taking refuge from secondary modern 'dirty work' or attempting to repair their 'spoilt careers.'<sup>88</sup>

The speed with which middle schools were established in England ensured that fundamental infrastructural issues, such as staffing and school buildings, were not adequately addressed. For his part Hargreaves argued that each identified deficiency tended to compound the influence of the other creating a cumulative effect. In this regard the structure and layout of school buildings intensified (or alleviated) staffing difficulties. There was little doubt that where new middle schools were purpose-built, such as Delf Hill,<sup>89</sup> the physical structure of the school could help promote the social and educational purposes for which it was established. However, in the case studies presented by Blyth and Derricott (1977), Burrows (1978), and Hargreaves (1986), this was not always the case. They found that middle school students were almost always fitted into existing

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86. Hargreaves (1986), pp. 9-10.

87. Gannon & Whalley, (1975).

88. Hargreaves (1986), pp. 206-207.

89. Blyth & Derricott (1977), p.50.

buildings which did not suit the aims and purposes of middle schooling. Unfortunately, form dictated function. Consequently, Hargreaves reported:

The housing of many 9/10 to 13 middle schools, like Moorhead, in old secondary modern premises left them an egg-crate structure of compartmentalised classrooms in their higher years, which tended to reinforce specialisation and differentiation.<sup>90</sup>

Furthermore, Hargreaves suggested it was possible to have innovation without any change. Primary Schools were relabelled middle schools, and the age structure of the students had changed, but little else occurred. Within these institutions teachers found it difficult to change how they delivered the curriculum. This situation was not helped by the reality that the school buildings had seldom been modified to cater for a new and different approach to learning and teaching.

By late 1977 two clear trends within middle schooling had emerged in the English setting. The first was that middle school growth in England — while following no regional or social pattern — was greatest in areas with expanding populations. Second, this growth tended to occur in those middle schools “deemed primary” rather than in those labelled secondary. Middle schools were seen by many LEAs as expedient, cost-effective institutions ideally suited to dealing with rapidly rising roll growth. According to contemporary political commentators middle schools were, at best, a temporary expediency in the English schooling system. Bryan and Hardcastle reached a similar conclusion, having noted “middle schools were actually preferred by many LEAs because they were cheaper to run.”<sup>91</sup> Nevertheless, some of these schools were endeavouring to implement a middle

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90. Hargreaves (1986), p. 209.

91. Bryan & Hardcastle (1978), quoted in Hargreaves (1986), p. 68.

school philosophy. Gannon and Whalley referred to the introduction of integrated work as one of the characteristics of the emerging middle schools. They commented that in middle schools:

Sequential skill learning needs to be of a different order, with a move away from uniformity of classroom work to a diversity of work even within a single subject area. The learner thus becomes less a receiver of knowledge and more a sharer in any learning, which may be taking place through reading, drawing, painting, acting, or movement and music.<sup>92</sup>

Gannon and Whalley noted that these early middle schools developed a range of middle schooling techniques such as: flexible timetabling (where the timetable became the “servant” of the curriculum), closer relationships between students and teachers, and the creation of a balanced curriculum where much traditional work was discarded to accommodate new forms of learning.<sup>93</sup>

However, the structural weaknesses of the vast majority of these middle schools were to lead in many instances to the demise of this form of schooling. The staffing debate and the lack of effective pre-service teacher training made staffing many of these middle schools particularly difficult. With the onset of falling rolls and economic retrenchment in the early 1980s many middle schools, particularly the Years 9- to-13 “secondary” ones, became too small to provide sufficiently specialized staffing and a wide range of subject areas.

The primary middle schools, while providing a more generalist education, were also put under a great deal of political pressure to secure better results and ensure greater access to specialized teaching. As Hargreaves commented:

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92. Gannon & Whalley (1975), p.67.

93. Gannon & Whalley (1975), p.68.

Having come into being and risen rapidly to prominence in the ‘revolutionary’ sixties and early 1970s, middle schools, after what in educational policy terms is but a brief span of time, now face full or partial extinction in the recessionary eighties.<sup>94</sup>

Another educational commentator, Brian Gorwood, predicted that the factors that forced the closure of these English middle schools — falling rolls, fiscal cuts, and the greater public demand for highly specialized teaching without adequate resources — would be those in the 2000-2010 period that would lead to the closure of many, if not most, of the primary schools in England.<sup>95</sup>

### **The English scenario: A cautionary tale**

The rapid rise in the number of middle schools mentioned above, along with the controversies that this generated within the English schooling fraternity, may provide some salutary lessons for New Zealand middle school proponents. Although many of the key middle school programmes and processes in the creation of these stand-alone middle schools, the lack of any major structural change within education by central government or the LEAs added to the rapid demise of these institutions during the 1980s.

Four main structural elements for the effective development of middle schools are evident from the English experience. First, the amalgamation of two distinct and different teaching traditions — primary and secondary — on the one site is of crucial importance. Intensive on-site professional development appears to be a major structural change needed to assist the viability of a middle school system. Efficient in-service training also needs to be supported by pre-service training

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94. Hargreaves (1986), p.3.

95. Gorwood, B. (1994) Curriculum Organisation and Classroom Practice in Primary classrooms—can we learn from middle schools? *School Organisation*. 14 (3), p.248.

programmes for those entering teaching at the middle school level for the first time.

Second, the lack of new school buildings designed to support middle school programmes and procedures appeared to have hindered the development of these institutions. Wherever LEAs attempted to place middle school children in existing school buildings, without sufficient funding or resources to create age-appropriate physical environments, they appeared to have failed. In areas where purpose-built middle schools were established the middle school philosophy seems to have been adopted more readily.

Third, adapting the curriculum to the various requirements of young adolescents was essential to the operation of middle schools. Accordingly, the linking of the timetable to the curriculum, along with achieving the best possible balance between specialised and generalist teaching, could not be ignored. In those middle schools where the curriculum had been adjusted to suit the perceived needs of emerging adolescents, with a view to achieving a balance between advisory homeroom teaching and specialised teachers, more effective programmes were able to be introduced.

A fourth issue (also applicable to the New Zealand situation) is for educators and administrators to be cautious whenever they contemplate the timeframe within which a middle school could be introduced. It will be recalled that (p.218) much of the growth of middle schools in England was attributable to rapid roll growth and the relative fiscal prosperity of the nation during the 1970s. However, roll

decline and fiscal stringencies in the 1980s meant these gains were quickly lost. Much of the 1970s educational debate appeared to be about trying to find an ideology to *explain* middle schools rather than establishing middle schools on a firm foundation from the outset.

As a study in educational efficiency the English policy makers seem to have given little consideration to the wider infrastructural changes that were required to support and sustain the development of middle schools once they had been established. The development of these institutions, principally as a response to the rapid growth in school-aged population, ensured that when the crisis over roll numbers was finished minimal support remained for middle schools. This was a situation created by both educational planners — who lacked access to the finance needed to support major structural change — and the theorists who failed to agree on the educational purposes for these new schools. There are significant overlaps in this issue between the English and New Zealand middle school experience.

### **The United States of America**

Of the three international studies analysed in depth here, American middle level schooling history most closely resembles that of New Zealand. For almost a century the American school system has been a three-tier one. The 1970s and 1980s were decades of intense reflection for educationists on this middle tier, the junior high school. These reflections lead to a strong reformation movement and the creation of middle schools. Within New Zealand critical analysis also took place, where intermediate schools were increasingly called into question from the 1970s. This scrutiny led to the creation of alternative middle school structures.

The junior high school movement began in Columbus (Ohio) in 1909<sup>96</sup> with a shift from the eight-year elementary/ four-year secondary model to a six-year elementary school, three-year junior high school and three-year senior high school structure.<sup>97</sup> One of the reasons for creating junior high schools was to better cater for the perceived needs of pre-adolescent students. By the 1940s a stand-alone junior high school followed by a separate senior high school had become the predominant pattern of school organisation throughout the United States of America (U.S.A.). The junior high school attempted to meet the needs and interests of the young adolescent. Staffed by trained secondary teachers, these schools were able to offer a wider curriculum than the elementary schools and provided specialist expertise in key curriculum areas. Owing to more generous funding they were also able to offer counselling services, better resourced libraries, and a greater variety of specialist teachers.<sup>98</sup>

During the 1960s, however, junior high schools came under a great deal of public criticism. Alexander and George identified the following factors as possible deficiencies in this schooling structure. First junior high schools had begun to curtail exploratory activities and electives due to public pressure to improve academic achievement. Second, these institutions had begun to adopt inflexible, fixed period schedules. Third, due to financial constraints schools had begun to eliminate counselling, individualisation and independent study programmes. Fourthly they reiterated public criticism that no one system existed nationally to

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96. Ikenberry, O.S. (1974). *American Education Foundations*. Columbus, Ohio: Charles E. Merrill Publishing Company, p. 289.

97. Alexander, W.M., & George, P.S. (1981). *The exemplary middle school*. New York: Holt, Rinehart & Winston, pp. 5-6.

98. Alexander, & George (1981), p.11.

educate this age-group.<sup>99</sup> At a broader national level American politicians were heavily influenced by “Sputnik” and the space race, culminating in an obsession with trying to enhance academic achievement, albeit predominantly in science, technology and mathematics.. The call for increased specialisation at an earlier age, and a popular public perception that young people were maturing faster and younger than ever before, lead to widespread dissatisfaction with junior high schools.<sup>100</sup> This dissatisfaction occurred at a time of rapid roll growth for this age-group, as had also happened in the 1960s in England, and in New Zealand in the 1970s.

American educational historians, Clark and Clark<sup>101</sup> (1993) reiterated many of these criticisms of the junior high school. The increase in tracking (streaming) and ability grouping, departmentalization and specialization had moved the junior high school away from its earlier foundations and increasingly towards the secondary school model. The adoption of many activities that were characteristic of the senior high school, such as formal dances, interscholastic competitions and the widespread dissatisfaction of teachers who were assigned to a junior high school, added to the general feeling of malaise at this time, these researchers concluded.

A call came at the Cornell Junior High School Conference in 1963 for of schools for this age-group to be generally reorganised.<sup>102</sup> The Cornell proposal set out

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99. Alexander & George (1981), pp. 11-12.

100. Lounsbury, J.M., & Vars, G. (1978). *A curriculum for the middle school years*. New York: Harper Row, p. 12.

101.Clark, S.N., & Clark, D.C. (1993). Middle level reform: The rhetoric and the reality. *The Elementary School Journal*, 93 (5), p. 450.

102.Alexander & George (1981), p.14.

four goals for a new middle school movement in the knowledge that the first middle school had already been established at Fort Couch in 1962. One main goal was that middle schools should be given their own status, rather than simply serving as a “junior” unit to an existing arrangement. They should also introduce some form of specialisation into Grades 5 and 6, while encouraging team teaching<sup>103</sup>. Not surprisingly, teacher education programmes would need reorganization in order to identify and meet the specific teaching requirements of emerging adolescents. It was thought that these new middle schools would then be able to better provide for the needs of these students, without having to abandon the best features of the traditional junior high model.<sup>104</sup>

While contributing to the gradual demise of the junior high school, the American middle school movement, since its origins in 1963 underwent an evolutionary process. During the 1970s and 1980s middle school literature (Alexander & George, 1981; Grooms, 1967; Wiles & Thomason, 1975) largely emphasized the value of having independent middle school institutions. By the early-1990s however, the emphasis had changed in this literature (Arnold, 1993; Beane, 1993; Eccles et al., 1993b; Epstein & MacIver, 1992) because researchers were now advocating providing middle school programmes and practices appropriate to this age-group, that were independent from the existing school structures. However, by the early-2000s middle school researchers (e.g. Elmore, 2000; George, 2001) tended to favour the integration of middle school programmes with middle school structures as the best model for meeting the perceived and real needs of emerging

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103. Team teaching consisted of about four teachers, each with their own curriculum strength, working collaboratively with the same group of students.

104. Alexander & George (1981), p. 14.

adolescents. This development will now be explored, as it provides a valuable comparison with the development of the New Zealand middle school movement.

### American “stand-alone” middle schools

Oliver Ikenberry (1974) in his work *American Education Foundations*, reported an earlier 1969 comparison of junior high schools with early middle schools.<sup>105</sup> He reported that the junior high school tended towards a secondary school emphasis on: subject-centred programmes, learning a body of information, teacher-made lesson plans, teacher control, and following a textbook approach. By comparison the early middle schools followed a more exploratory style programme consisting of: a child-centred approach, learning how to learn, belief in oneself, flexible scheduling and team teaching.

By 1981, Alexander and George could define an American middle school as being:

[an institution] of some three to five years [situated] between the elementary and the high school focussed on the educational needs of students in these in-between years and designed to promote continuous educational progress for all concerned.<sup>106</sup>

Since the late-1960s two strands of educational debate had arisen concerning schooling provisions for emerging adolescents. On the one hand there was the creation of middle schools as direct replacements for junior high schools. As mentioned earlier, over 30 different models of school structure existed in the USA to cater for this age-group. These ranged from the extended elementary school to

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105. Ikenberry (1974), p. 287 quoting Educational Research Service Circular. (1969). *Middle Schools In Action*, Washington, D.C.: American Association of School Administrators, p.17.

106. Alexander & George (1981), p.3.

the extended high school, and with almost every grade-span combination in between — from two-year intermediate schools to five-year middle schools.<sup>107</sup> Much of the middle school literature of the 1960s (e.g. Grooms, 1967) commented on the value and success of the middle school grade-span structure, and its alleged superiority to any other structure for catering for emerging adolescent needs.

On the other hand the beginnings of the debate concerning how best to cater for the needs of this age group, independent of any one particular school structure, can be detected. Grooms (1967), in a book titled *Perspectives on the Middle School*, claimed that the junior high school, with its huge student enrolments, frequent class changes and teachers meeting 150 students a day, the junior high school was “too often a six or seven-ring circus instead of an educational institution.”<sup>108</sup> In his opinion a middle school was significantly different from an elementary one because the former was typically located a greater distance from the student’s home and students were housed in larger, more impersonal, buildings. The middle school tended to have a larger school population with a greater ethnic mix of students and with a wider range of peers. Grooms concluded that in middle schools previous understandings of how schools work would no longer be relevant, if they were to effectively cater for the needs of the emerging adolescent.

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107. Epstein, J. (1990). What matters in the middle grades: Grade spans or practices. *Phi Delta Kappan*, 14 (25), p. 438.

108. Grooms, M.A.(1967) *Perspectives on the middle school*. Ohio: Ohio Books, p.3.

An alternative model,<sup>109</sup> was proposed, wherein the middle school would consist of ungraded mixed age groups, classes created from identifying needs (not based on age) and teams with mixed discipline teachers delivering independent study programmes. Along with these arrangements there would be improved pre-service teacher training within which the middle school objectives were to be clearly articulated. The style of principalship would be different, Grooms maintained, in that the middle school principal would foster links with the community and with the contributing elementary schools as well as local high schools. The greatest change he foresaw, however, related to the delivery of a curriculum based on adolescent needs, in the wish to achieve a balance between skill acquisition and specialisation. Consequently, timetables and school plant were deemed less important than meeting the needs of adolescents. Grooms suggested that the later would be different from both the elementary and high school curriculum.

Grooms was not alone in delineating what the middle school structure should be. Alexander and George (1981) in their work, *The Exemplary Middle School*, also endorsed the concept of establishing the middle school as a stand-alone institution. But certain conditions had to be satisfied before these schools could operate as their advocates intended. Erecting a school building within which the needs of the students could be met by a well-designed curriculum was identified as a key concern:

The challenge of the middle school building, thus, is to be large enough to hold a number of students, which will justify the expenditure of funds necessary for the exploratory programs, which educators believe these students require. At the same time, however, the middle school building must be organised in a

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109. Grooms (1967), p. 31.

manner which ensures a sense of community and a personalized educational experience for each student.<sup>110</sup>

Alexander and George's comments about the physical environment encompassed the reality that if insufficient appropriate space existed then some courses could not be delivered. The provision of both time and space conducive to the learning needs of the emerging adolescent was seen to be crucial. Not surprisingly, then these structural changes extended to teacher training, in the desire to staff these new schools effectively.

The argument for middle schools to be established as specific grade-span, independent institutions tended to dominate much of the educational literature on this topic well into the 1980s. The idea that one structure could best serve the needs of emerging adolescents, even in the face of some 30 alternatives, had found fertile ground. In the work of Valentine and Whitaker (1997),<sup>111</sup> for example, statistical research was presented concerning the most appropriate grade-span pattern of schooling for young adolescents. This literature revealed that:

In 1966 a majority of principals believed that the 7-9 grade [junior high] pattern was the most appropriate for young adolescents. By 1981, that belief shifted significantly, with 54% favouring the 6-8 configuration. The shift continued into the nineties, with 72% favouring 6-8 by 1992.<sup>112</sup>

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110. Alexander & George (1981), p. 198.

111. Valentine, J., & Whitaker, T. (1997). Organisational trends and practices in middle level schools,. In Irvin, J.L. *What current research says to the middle level practitioner*. Columbus, Ohio: NMSA, pp. 278-279.

112. Valentine & Whitaker (1997), p. 278.

In 1967-1968 Alexander reported that 1,101 middle schools were operating across the United States,<sup>113</sup> but by 1981, Valentine, Clark, Nicholson and Keefe reported that that figure had risen to 4,094 middle schools.<sup>114</sup> Fifteen years later McEwin, Dickinson, and Jenkins noted the existence of 7,378 American middle schools.<sup>115</sup> It is noteworthy that the establishment of middle schools did *not* lead to the complete demise of other types of schools for this age-group, however. In their nationwide study, MacIver and Epstein (1993),<sup>116</sup> identified the various schools whose teachers taught Grade 7. In 1990 for instance 39% of Grade 7 students attended a middle school, 25% a two-year intermediate school, and only 17% a junior high school. By comparison, only 9% attended a full (K-8) elementary school whereas 10% attended all other types of school, including K-12. Nevertheless, the rapid growth in the number of middle schools during the period 1960-1990 did not mean there was universal support by Americans for this type of institution. Continuing lack of support for middle schools, in some states of America, such as Cleveland, will be covered shortly.

### **American middle school programmes and practices**

Across the United States the growth of middle schools as the institutional arrangement designed to cater for the needs of the emerging adolescent came under increasing scrutiny during the late-1980s and early-1990s. Apart from the fact that the majority of this age-group of students did not attend a middle school, of those who did many were becoming dissatisfied with their schooling. Some of

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113. Alexander & George (1981), p. 20.

114. Valentine & Whitaker (1997), p. 278.

115. Valentine & Whitaker (1997), p. 278.

116. MacIver, D., & Epstein, J. (1993). Middle grades research: Not yet mature, but no longer a child. *The Elementary School Journal*, 93 (5), 519-533.

this criticism, though, could not reasonably have been levelled at middle schools. For example, the middle schools created in Cleveland in 1993 were mandated by the 1993 Desegregation Consent Decree which attempted to ease crowding at elementary schools — particularly inner city, low socioeconomic schools — by eliminating junior high schools and setting up Grade 6-8 schools in these older buildings.<sup>117</sup> While this was arguably a pragmatic solution to an immediate issue (similar in nature to that already discussed in the English case study) it did little to endear the parents of Cleveland to the newly introduced middle schools. Where these schools were created for solely fiscal reasons there appeared to have been less support for them from the parents and community and greater opposition.

From the late-1980s the research literature on middle schools began to assume a new direction. An increasing number of researchers were commenting that middle schooling philosophies could be promoted independent from the school structures in existence. As Mergendoller<sup>118</sup> shrewdly observed “structural changes often represent cosmetic fiddling, rather than fundamental change in the purposes, priorities and functioning of schools.” The work of earlier researchers and practitioners, in his opinion focussed too much on the structural changes at the school level, many of which were imposed externally. Mergendoller was adamant that structural changes of and by themselves, will not lead to improved student learning and attitudes.

Mergendoller’s observations echoed the sentiments of educational researchers in the late-1980s and early-1990s such as Joyce Epstein and James Beane who wrote

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117. Spector, K. (2000, August). District phases out troubled middle schools. *Catalyst*, p. 1.

118. Mergendoller, J. R. (1993). Introduction: The role of research in the reform of middle grades education. *The Elementary School Journal*, 93 (5), p. 444.

prolifically on the purposes, priorities and functioning of school programmes rather than on the structural arrangements during this era. Much of Beane's writing began with an exploration of what was deemed unsatisfactory with the traditional junior high school arrangement. An overemphasis on specialisation, the division of learning into distinct disciplines, the overcrowding of the classrooms and the curriculum, the emphasis on testing, and the delivery of the senior high school curriculum to younger children were some of the main criticisms that Beane levelled at this institutional model.<sup>119</sup>

The pressing need to develop more responsive curriculum<sup>120</sup> and pastoral programmes — no matter what the school structure — became a dominant middle schooling theme from the late-1980s. MacIver and Epstein (1993) reiterated that it was *not* the changing of grade-spans but the implementation of appropriately responsive programmes that was required. They suggested a review of the use of scheduling and grouping procedures and emphasis on the team teaching and breaking down of the widespread departmentalization of subject disciplines. MacIver and Epstein reported in favour of reorganising teaching time, providing a wide variety of different teaching styles and developing responsive programmes and curriculum to meet the needs of emerging adolescents.<sup>121</sup>

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119. Beane, J. A. (1990). *From Rhetoric to Reality: A Middle School Curriculum*. Ohio: NMSA

120. Beane was at this time developing a concept of democratic curriculum, a curriculum that was able to respond to the issues and interests of the emerging adolescent.

121. MacIver & Epstein (1993), p. 529.

In his work on a curriculum for the middle years, James Beane,<sup>122</sup> went a great deal further than other American educationists in attempting to outline a curriculum that was responsive to both the needs of emerging adolescents and their preferred styles of learning. Beane argued that middle schools must provide a general education, based on the common needs and interests of this age-group, one that would focus on the personal and social issues that students were facing both in their own lives and society generally. This curriculum must assist emerging adolescents to develop a sense of personal identity and give them the skills and strategies they needed to work with their peer group, family and the many and varied societal institutions with which they are likely to come in contact. Such curriculum should be democratically based, and should be selected by the students collectively, while allowing for independent study and group work as required both by teachers and the students themselves.

Beane concluded that if the middle school programme was to be based on the agreed characteristics of the early adolescent then the curriculum needed to be redesigned along developmentally appropriate lines. In a similar vein David Hough<sup>123</sup> (1997) later asserted that “a bona fide middle school is not an organizational structure consisting of a specific grade level configuration, set of components, and name that includes the word middle.” Rather a middle school adopted an agreed set of features that meet the needs of the emerging adolescent. He went on to declare that these middle schooling components included:

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122. Beane, J. A. (1990). *From rhetoric to reality: A middle school curriculum*. Ohio: NMSA or again, Beane, J.A. (1990, May). Rethinking the middle school curriculum. *Middle School Journal*, 21 (5), 1-5.

123. Hough, D. (1997). A bona fide middle school: Programmes, policy, practice and grade span configurations. In Irwin J.L.(Eds.). (1997). *What current research says to the middle level practitioner*. Ohio: NMSA, pp. 285-291.

[They are] Most often conceptualised as *teams of teachers* meeting during a *common planning time* to (among other things) develop integrated curricula and teach within the structure of a *flexible schedule* that allows for more in-depth study and experiential learning. *Advisory* programs are provided in an effort to establish positive relationships between young adolescents and adults, ensuring that students are known well by at least one adult. Students are encouraged to participate in *intramural activities* to build self-esteem and promote healthy life-styles. *Exploratory* classes or enrichment experiences are provided to allow students a chance to experiment with novel subject matter and interest areas without fear of being penalized by a letter grade. And all of the above are accomplished within *small heterogeneous learning communities* that emphasize *cooperative* teaching strategies that capitalize on the social dimension of teaching and learning.<sup>124</sup>

Statements such as these were useful to educators working in a wide range of different institutions, but who were equally concerned with adolescent development. Because the emphasis in the middle school literature of the 1980s had moved away from the concept of one structure of schools, such as the middle school, as being the most appropriate to meet the needs of the emerging adolescent, the debate concerning the most appropriate features of a middle level education were widened.

With the release of the Carnegie Corporation's *Turning Points* report in 1989 a greater emphasis was placed on the need for middle schools to be developmentally responsive, to seek social equity and to provide a general education for all students. Nevertheless, throughout the 1990s many commentators suggested that an "academic excellence" feature should be given equal status. Supporters of the "standards" movement<sup>125</sup> in America during the mid-1990s in particular, saw this omission as a serious weakness in the *Turning*

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124. Hough (1997), p. 285. Authors own italics.

125. The "Standards" movement advocated a return to basic curriculum knowledge with intensive summative assessment on very specific curriculum content and criteria.

*Points* document. The work of Lipsitz et al.<sup>126</sup> addressed this anomaly, by outlining three middle school tenets. High performing schools for this age-group needed to be developmentally responsive, academically excellent, and supportive of social equity policies and practices.

As the 1990s drew to a close, middle school critics identified in this new wave of middle schooling research the very arguments they required to push for their closure. In some American towns and cities (such as Cleveland, Ohio) the reality of falling elementary school rolls or the historic purpose behind setting up middle schools initially, had ceased to exist. It was argued that if a responsive middle school education could be delivered in *any institution* then in areas where cost cutting had to be undertaken stand-alone middle schools ought to be the first institutions to be abandoned.

The closure of Cleveland's middle schools in 2000 by local school superintendent, Barbara Byrd-Bennett, was one of the first of these decisions taken. It was reported that Cleveland students were particularly transient, with 89 out of every 100 students relocating to a new neighbourhood each year.<sup>127</sup> Falling elementary school rolls, alongside overcrowded middle schools led to the return of Year 7 students to elementary school and the re-establishment of a two-tier system.<sup>128</sup> Accordingly, this educational authority saw the middle schooling philosophy not to be the sole preserve of one type of school. Middle schooling could therefore be carried out in any educational institution.

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126. Lipsitz, J., Mitzell, M. H., Jackson, A. W., & Austin, L. M. (1997). Speaking with one voice *Phi Delta Kappan*, 78(7), pp. 534-535.

127. Spector (2000), p.3.

128. Spector (2000), pp.2-4.

However Paul George (2001),<sup>129</sup> reporting on the middle school movement in Florida, painted a much more positive scenario. In this state some 500 middle schools remained open, each catering for between 1400 and 2000 students. These schools are more racially desegregated at the school level than they were thirty years ago, George observed, although “safety and security are [still] great concerns.”<sup>130</sup> It is noteworthy, that among the most recent developments for middle schools mentioned by George, increasing school sizes, more female principal appointments and the loss of middle school principals to high school principalships are listed. He also commented on the establishment of new 9<sup>th</sup> grade centres where “several districts have created ...[these] centres as educational way stations between middle and high school.”<sup>131</sup> These centres assist with the transition of students from middle school to high school and are based within middle schools and operate as stand-alone institutions. This development is reminiscent of a remark made by one of the intermediate school principals interviewed as a part of this research, Trevor Rowse, when he suggested that “perhaps a separate Year 9 and 10 school would be a good idea — to focus on their [adolescent] special needs.”<sup>132</sup>

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129. George, P.S. (2001). The evolution of middle schools. *Educational Leadership*, 58 (4), 40-44.

130. George (2001), p. 40.

131. George (2001), p.40.

132. Rowse (2002), p. 3.

## American middle schools: An integrated approach

In 1990 American researchers Eccles and Midgley<sup>133</sup> coined the term “stage-environment fit” to describe the most desirable fit between the developmental needs of the adolescent and their educational environment. They claimed that this relationship was crucial to the success of the development of the emerging adolescent. Three years later Eccles et al.<sup>134</sup> explored the negative fit they believed existed between adolescents and traditional junior high schools. They identified five aspects of these institutions that did not meet emerging adolescents’ needs or actively worked against their sense of motivation and self-esteem. These were: greater teacher control and discipline with fewer opportunities for student decision making; less personal and positive student-teacher relationships; greater whole-class orientation and between-classroom ability grouping. Furthermore, junior high school teachers considered themselves to be less effective teachers which led to a similar decline in confidence among their students; and these teachers used a higher standard in judging students’ competence and grading student performance leading to a decline in student academic motivation,<sup>135</sup> according to these researchers.

Some of this research facilitated the development of a more responsive curricula programme in middle schools for emerging adolescents. That research which was taken on a best-fit model in the 1990s reinforced the view that a combination of developmentally responsive curricula programmes to meet these students’ needs

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133. Eccles, J.S., & Midgley, C. (1990). Changes in academic motivation and self perception during early adolescence. In Montemayor, R., Adams, G.R., & Gullotta, T.P. (Eds). *From childhood to adolescence: A transitional period?* Newbury Park: Sage, pp. 134-155.

134. Eccles, J.S., Midgley, C., Wigfield, A., Buchanan, C.M., Reuman, D., Flanagan, C., & Mac Iver, D. (1993). Development during adolescence: The impact of stage-environment fit on young adolescents’ experiences in schools and in families. *American Psychologist*, 48 (2), 90-101.

135. Eccles et al. (1993 ), pp. 93-94.

and an age-appropriate school structure was best for emerging adolescent. More recently, American researchers Roeser, Eccles, & Sameroff (2000) support Eccles et al.'s earlier work whereby appropriate programmes delivered in age-appropriate institutions is likely to satisfy the educational requirements of emerging adolescents.

Roeser et al.<sup>136</sup> believed that the integration of specific instructional, interpersonal and organisational dimensions created effective middle schools in the view of *adolescents themselves*. Their research suggested it was the adolescents' perception of their school — and the types of programmes and opportunities to which they were exposed — that determined their success and achievement levels:

When adolescents perceive themselves as academically competent and able to master school-related tasks, they get higher grades, and when they achieve good grades, they feel more competent academically.<sup>137</sup>

They went onto argue that the traditional American belief that adolescence was a time of “stress and storm” was probably not the reality. Rather, Roeser et al. declared that “more than half of all adolescents in the United States are able to constructively manage the multiple transitions in body, thought and emotion, social relationships, and school that are characteristic of the early to middle adolescent period.”<sup>138</sup> Nevertheless, up to 50% of young people were seen to be at risk. Engagement in high-risk behaviour and activities such as “[physical] violence and vandalism, unprotected sex, abuse of alcohol and drugs, skipping

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136. Roeser, R., Eccles, J., & Sameroff, A. (2000, May). School as a context of early adolescents' academic and social-emotional development: A summary of findings. *The Elementary School Journal*, 100 (5), 443-471.

137. Roeser et al. (2000), p. 452.  
138. Roeser et al. (2000), p. 444.

and failing school and so on”<sup>139</sup> was identified by these researchers as a particular concern.

According to Roeser et al., it was at the interface, between school and adolescents’ social and emotional development that the greatest change could take place:

We believe that schools in the twenty-first century will need to continue to focus on a dual mission: (a) providing classroom and school environments that address the developmental needs of all students and (b) providing a “hub” for additional support services needed to ensure that high-risk students get on track academically toward a successful future.<sup>140</sup>

Successful middle schools, they suggested, provided links to adolescents’ experiences, motivations and behaviours and included the students’ voices in all aspects of school life. It was important that American students were able to design their own tasks and that schools stopped rewarding only the highest achieving students. Equally important was Roeser et al.’s. conclusion that schools functioned more effectively as smaller organisations, which made it easier for their staff to coordinate health and mental services so that an environment of “readiness to learn” was created for at risk students. Teachers who were open to students’ prior learning and knowledge were more effective as were those who identified and eliminated overt and silent discrimination. The challenge that Roeser et al. outlined was therefore, one in which educationists needed “to understand how to create middle schools that work, middle schools in which successful adolescent and adult development are seen and treated as interdependent.”<sup>141</sup>

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139. Roeser et al. (2000), p. 444.

140. Roeser et al. (2000), p. 465.

141. Roeser et al. (2000), p. 466.

These researchers were not alone in the early-2000s asserting the need to consider middle schools as specific stand-alone institutions. The National Middle Schools Association (NMSA), in its research summary document number 4, listed what it perceived to be the components of an exemplary middle school. Such institutions “address[ed] the distinctiveness of early adolescence with various instructional and organisational features”<sup>142</sup> such as, interdisciplinary team-teaching, advisory programmes, exploratory and transition programmes and using various methods of instruction.

While Randy Elmore (2000),<sup>143</sup> claimed that the literature supporting stand-alone institutions was both extensive and compelling, he also considered a range of specific aspects that determined the most desirable institution. He stated that:

The ideal middle school features the following elements: learning teams/ communities, a focus on integrated content and critical thinking, flexible grouping for successful learning, empowerment of faculty, improved training for teachers, emphasis on health and safety for learners, and connections between schools and communities.<sup>144</sup>

From his research into successful American middle school practices Elmore added that effective leadership both within and outside the school was an important determinant.

While the evidence is still not conclusive that a middle school structure provides the most effective means to cater for the needs of emerging adolescents, one theme has emerged forcefully from this discussion of some American research literature. A combination of middle school programmes with effective middle

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142. National Middle School Association. (2000). (Research summary No. 4). *What are the components of an exemplary middle school?* Ohio: Author

143. Elmore, R. (2000, December). Leadership for effective middle school practices. *Phi Delta Kappan*, 82 (4), 269.

144. Elmore (2000), p.269.

school structures seems to be highly effective in meeting these students' needs. Where once it could have been argued that there was a lack of evidence that the middle school structure influenced positively student learning, the welter of middle school research literature that has been published — particularly from 2000 and especially in the United States of America<sup>145</sup> — has finally begun to put that assertion to rest. Nevertheless, the question remains: What implications might this research literature have for the structure of schooling for this age-group in New Zealand?

## NEW ZEALAND MIDDLE SCHOOLS

Throughout the 1990s some vigorous debate concerning whether one particular school structure would best cater for the needs of young adolescents occurred in New Zealand (see chapter 2.). Although little conclusive evidence could be provided at that time to support the establishment or retention of any particular school structure, this did not stop commentators from making bold claims about the respective merits or deficiencies of some schooling models. Such assertions were less evident in the research material gathered from the three middle school principals interviewed for this research. However, each of them remarked that the development of their middle school had been shaped by the rhetoric of "parental choice," and all were adamant that they were providing a worthwhile alternative for those parents who wanted their children to follow a different educational path.

While the current school structures suggested that the alternative for all students was to transfer to a secondary school, middle schools provided an alternative

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145. Articles such as those by Elmore (2000), George (2001), and Roeser et al.(2000) in the American literature, and Neville (2000), Nolan and Brown (2001), and Ward (2001) in the New Zealand literature.

option. For John Crone in Hamilton, there already existed a good deal of parental satisfaction in the local secondary school. To this end he readily conceded: “We already had an outstanding resource in our local high school that was meeting the needs and aspirations of our community.”<sup>146</sup> Yet Crone was convinced that there was also sufficient interest in Berkley Middle School “providing an alternative, we were fitting in and we were looking at what we did best — not what we could do better than them.”<sup>147</sup> This creation of an alternative choice was echoed in the comments of other middle school principals. Ann Milne commented, for example, that “we are catering for a “niche” they [the Ministry of Education] tell me and that might be so, you know.”<sup>148</sup>

The middle school provided an alternative, albeit one that may not suit every student. The fact that these institutions were not for every student was evident in all of the three interviews. Crone commented that by providing for Year 9 students Berkley Middle School provided a buffer between “the child who stays here and wants to stay a child, and the other one who can’t wait to be in the next stage [the secondary school].”<sup>149</sup> There was no doubt that for the three principals student and parental choice was a key concern, and they were convinced that this choice of schooling would culminate in greater middle school enrolments in their near future. Alan Dennis’ remarks clearly reveal this sentiment:

The trend is for them to stay onto Year 9, in the first year 23 stayed for Year 9. This year 130 [students] have stayed. Where 20% were staying now 70% stay. We will have 80 in Year 10. They are choosing not to go onto our [Invercargill] area high school, even though it is brand new.<sup>150</sup>

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146. Crone (2002), p.7.

147. Crone (2002), p.7.

148. Milne (2002), p.7.

149. Crone (2002), p.8.

150. Dennis (2002), p.5.

Therefore, while middle school proponents had envisaged initially that middle school students should “be catered for entirely within separate three- and four-year schools,”<sup>151</sup> the reality in local New Zealand communities has been different from this. Middle school leaders saw their schools as providing an alternative, another educational pathway, albeit one that they believed catered better for the educational needs of those students who chose to enrol.

## CONCLUSION

This chapter has described the New Zealand school structures that presently cater for emerging adolescents. In particular it has attempted to ascertain whether any one school format catered more effectively for this age-group than another. It will be recalled that within the New Zealand educational community five specific school structures exist to cater for these students. Although recent research carried out by ERO did not identify any one structure as catering most effectively for this age-group than another it was unable to fully investigate the effectiveness of the seven middle schools that currently exist because of their small number nationally and the short time that they had been in operation. Not surprisingly perhaps, the ERO report stated that further research needed to be conducted on the school structures that cater for Year 7 to 10 students given that Year 9 and 10 boys and girls appeared to be the “forgotten” ones within New Zealand schools.<sup>152</sup>

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151. Lee & Lee (1998), p. 29.

152. Education Review Office (2000), p. 51.

Chapter 5 will investigate the development of three of these New Zealand middle schools from the perspective of the principals of these schools. Furthermore, chapter 7 will analyse the development of a fourth middle school, that of Sunset Junior High, through documentary evidence provided by newspaper clippings of the time. From these four middle schools some important conclusions can be drawn about the unique nature of New Zealand's middle schools. This research will assist in formulating a clearer understanding of the nature of middle schools as they have developed nationally, over the decade of the 1990s.

A study of the international educational structures that cater for this age-group has highlighted further issues for New Zealand educationists to consider. While the Australian middle school model is younger than that of New Zealand, it appears to have been introduced more rapidly in certain states (e.g. Queensland). By comparison, the English experience reveals a lack of pedagogical support for the structural shift to middle schools, an observation which is noteworthy for those New Zealand educators who wish to develop these schools. Finally where the American middle school literature of the late-1980s had suggested that stand-alone middle schools were the best institutional arrangement in which to cater for emerging adolescents, more recent research has indicated that there also needs to be a sound pedagogical and philosophical basis to independent middle level institutions.

It may be that if a clearly articulated middle schooling pedagogy could be established — as Hargreaves suggested in the English case study and Roeser et al.

in the American — then there might be greater agreement that middle schools can cater best for the needs of emerging adolescents. As Eccles et al. commented:

There will be positive motivational consequences when these two trajectories [adolescent growth and school environment] are in synchrony, that is, when the environment is both responsive to the changing needs of the individual and offers the kind of stimulation that will propel continued positive growth.<sup>153</sup>

Furthermore, the pedagogical debate is a much wider one than that of school structure alone. To this end Milne stated:

I think we need to really shake up that whole debate about what is it that we do well and what is it that we as a whole sector think about curriculum, kids learning, significant adults, curriculum integration, community involvement, [and] service learning — all of those things that come up when you talk about the developmental needs for challenge and higher level thinking.<sup>154</sup>

This educational discussion is as much about middle schooling philosophy as it is about the middle school format. In particular the themes of educational efficiency and age-appropriate curricula programmes have been raised in this chapter. Each of the international case studies have suggested that the structure of schooling adopted in their respective countries has had a good deal to do with the issue of educational efficiency. While the public debate may have appeared to have been pedagogical, in reality it has frequently consisted of issues to do with the most politically expedient course of action.

Furthermore, the concept of an age-appropriate school structure, while supported by the variety of different forms of middle schools which exist within the international context, is also confounded by the very variety of age-spans that

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153. Eccles et al.(1993), p. 92.

154. Milne (2002), p. 10.

they encompass. In addition, these schools are complicated by their conflicting placement within elementary and secondary school traditions. While little consensus on this issue exists, in the global forum, it is probable that little more can be achieved to resolve this dilemma in the national debate.

In the following chapter research material will be presented which reveals that a uniquely New Zealand middle school structure may have already begun to have developed, one that has both a strong pedagogical base and an institutional integrity designed to support the needs of the emerging adolescent.

## **Chapter Five**

### **A Uniquely New Zealand Middle School**

#### **INTRODUCTION**

During the 1920s the Minister of Education, C.J. Parr, sought to establish a uniquely New Zealand structure of schooling for the emerging adolescent. While he gathered ideas from the international community — principally America (and to a lesser extent England) — his aim, in this period of “experimentation,” was to create a structure of schooling which recognized the particular needs and aspirations of New Zealand youth.<sup>1</sup> Middle school development in New Zealand, as distinct from intermediate schools, began in earnest again from the mid-1990s. This chapter considers what, if anything, typifies New Zealand middle schools. Is there a version of middle schooling that is uniquely New Zealand in flavour? How does the data collected and literature inform and address this question?

The challenge for New Zealand educationists is to “understand how to create middle schools that work, middle schools in which successful adolescent and adult development are seen and treated as interdependent.”<sup>2</sup> This chapter will investigate the development of New Zealand’s seven middle schools during the latter half of the 1990s, to ascertain the degree to which an uniquely New Zealand model of middle schools exists. This study will be followed in Chapter 6 by a study of the political forces and constraints that have also had a significant role to play in the formation of these schools. In the development of any new structure of

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1. AJHR. 1925 E-1 p.3 Parr stated: “There is no need for experiment regarding the value of junior-high-school principle itself. That stage has passed.” Quoted in Watson (1964), p.45.

2. Roeser (2000), p.466.

schooling — as already shown in the three international case studies (Chapter 5) — there is a balance of two forces — the pedagogical and the political. This chapter begins with an overview of the five intermediate and middle schools included as part of this research. Three of these schools are middle schools and their structure is indicative of the middle school as it exists currently in New Zealand.<sup>3</sup> The literature and interview data are then compared to ascertain what might be unique about a New Zealand middle school structure.

## THE FIVE SCHOOLS RESEARCHED

This chapter begins with “thumb-nail” sketches of the five schools and principals interviewed during 2002. Three of these principals (Crone, Dennis, and Milne) are middle school principals, and two are intermediate school principals (Crickmer, and Rowse) opposed to the development of middle schools. The interview methodology used for this research has been outlined in chapter 4. This material adds to the research already available on Tweedsmuir Junior High School and Clover Park Middle School while introducing some of the earliest research material on Berkley Middle School in Hamilton.

Furthermore, a New Zealand literature review included a series of research readings created in 1997 for a Christchurch College of Education post-graduate diploma course. These readings were collated by three principals — two of whom were middle school principals — to be used as study guides for teachers interested in gaining background research on middle school development. Larry Forbes, then Principal of St. Andrews Middle School and Ross Lamb, Principal of Southern

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3. In Chapter 7 a fourth middle school case study, Sunset Junior High School, will be examined.

Cross Middle School were joined by David Bycroft, an intermediate principal of Christchurch, to prepare these study documents.<sup>4</sup>

Since 1997 a large number of practitioner created literature on New Zealand middle schools has been published. Specific, school based literature outlining research into the current seven existing middle schools included that carried out with three of these middle schools: Tweedsmuir Junior High; Dennis, (1997); Potter, K., (2000); Potter, N., (2001); Shanks, (2000); St. Andrews Middle School; Strachan et al., (1996), and Ward, (1997, 2001); and Clover Park Middle School; Neville, (1997, 1999).

The following “thumb-nail” sketches of the five principals and the schools used in the principal interviews provides background information and understanding of how these schools became middle schools (or resisted the concept). The five schools involved in these interviews appear below in alphabetical order. Extracts from the interviews with the principals are interspersed where relevant, to illustrate important issues.

### **1. Berkley Normal Middle School**

Berkley Normal<sup>5</sup> Middle School is a three-year (Year 7 to 9) middle school of some 500 students situated in the university suburb of Hillcrest, Hamilton City.<sup>6</sup> The school acts as a host for teacher trainees from the local university’s School of

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4. Christchurch College of Education (1999) *Middle Schools: Extramural Course: Handbooks 1-4*, Christchurch: Author.

5. The term “normal” refers to a school which acts as a host to teacher trainees from a closely aligned Teacher Training College.

6. Crone, (2002) An interview with John Crone, Principal of Berkley Normal Middle School unpublished interview. Appendix B.

Education. It was an intermediate school before its change of class to a “restricted composite school” in 1997.<sup>7</sup> Seven-eighths of the students enrolled at Berkley Normal spent their previous six years at the one normal contributing primary school. Prior to that, most students had some form of early childhood experience. The school’s community is dominated by parents with university degrees. The Ministry of Education classified Berkley as a decile 9 school, the second highest socio-economic grouping.

While its local community has been declining in size — partially owing to the cost of housing in the immediate area — the school had, during this study begun to attract students (28%) from the nearby rural area, mostly life-style blocks. Approximately 16% of the school population identify themselves as Māori. The school’s roll was 500 pupils, including 43 students in Year 9, in 2002. The school also has a community of international (fee-paying) students.<sup>8</sup> Berkley is the only state three-year middle school in New Zealand.<sup>9</sup> As the principal, John Crone, commented “we looked at three years because I wanted a beginning, a middle, and an end. [In] the Intermediate system the groups are either coming or going — there is no middle.”<sup>10</sup> The Year 9 students are taught in separate age classes, as are the Year 7 and 8 students.

Crone is an experienced teacher and principal. Before his first principalship, at Katikati Contributing Primary School, Crone spent eight years lecturing at

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7. The title of middle school does not exist within the 1989 Education Act and all such school are titled “ Restricted Composite Schools,” within the definition of the act.

8. Crone (2002), p.5.

9. The other three-year middle school, Raumanga in Whangarei, was established as a full primary school in 2002.

10. Crone (2002), p.7.

Palmerston North Teachers' College. He has been Principal of Berkley for 16 years. During the interview he traced his interest in middle schools to the 1970s when he took university honours papers specializing in middle school education. In 1978, he visited the United States of America to view the, then, junior high school model “[but] I didn’t like the Junior High School concept the States had at that stage.”<sup>11</sup> His desire to create a genuine middle school environment began prior to his first principalship and came to fruition in his appointment to Berkley Normal Intermediate School. Crone commented “I always wanted to be principal of a middle school before I ever became a principal.”<sup>12</sup>

With the development of *Tomorrow's Schools* policies after 1989 the opportunity to fulfil his desire to develop a middle school became possible. Berkley, in his opinion, was well underway to become New Zealand's first middle school. According to Crone, extensive, positive discussions had been held with the local high school principal. Crone stated “[The high school principal] and myself, the two major players that would be affected, had been in dialogue for some months about it [middle school status], I had the support, his understanding”<sup>13</sup> Unfortunately, the tragic death of the high school principal in 1991 delayed the development of Berkley as a middle school for six years. Berkley Normal Middle School achieved its middle school status in 1997.

## **2. Bruce McLaren Intermediate School**

Bruce McLaren Intermediate School, situated in a semi-light industrial, semi-horticultural suburb of Waitakere City, is the westernmost of the four cities that

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11. Crone (2002), p.3.

12. Crone (2002), p.3.

13. Crone (2002), p.3.

make up the metropolis of Greater Auckland. The school consists of 20 classrooms grouped into five syndicates of three or four classes each. Three syndicates cater for the Year 7 students and two syndicates for Year 8 students. All classes are straight Year 7 or Year 8 classes. The school also hosts the West Auckland Technology Centre providing technology classes for Year 7 and 8 students attending the local full primary schools. The school belongs to the West Auckland cluster of schools comprising a strong group of principals who believe in working collegially.

David Crickmer<sup>14</sup> has been principal of Bruce McLaren since 1990. He began his schooling in Kenya, attending school there from the age of 5 to 17-years-old. He attended Borough Road College for Teachers (London) from 1963 to 1966, and specialised in the teaching of 9- to 13-year-olds (the Lincolnshire System). He taught in London for three years before beginning his teaching career in New Zealand, in Westport during 1969. He has taught in a number of full primary and contributing schools.

With the *Tomorrow's Schools* policies of 1989, Crickmer approached the Ministry of Education (in late-1990 or early-1991) with the suggestion that Bruce McLaren Intermediate School become a middle school. However, "we were told very clearly that they would oppose us changing to a middle school."<sup>15</sup> During the late-1990s Crickmer was a member of the New Zealand Intermediate Principals' Association Executive Committee and, as a member, was well aware of the developments concerning middle schools that had been occurring elsewhere in

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14. Crickmer, (2002) An interview with David Crickmer, Principal of Bruce McLaren Intermediate school, unpublished interview. Appendix A.

15. Crickmer (2002), p. 2.

New Zealand. Personally, Crickmer was in favour of the middle school movement:

Coming to an Intermediate, I could really see the advantages for them, and my biggest complaint about them is their being too short and I am fully in favour of expanding them either to capture Standard fours or capture Form three.<sup>16</sup>

His opposition to middle schools he stated, however, was based on how they had come into existence, rather than of their existence per se.

In 2000 Henderson Intermediate announced their decision to become a middle school and for Crickmer “it was the political implications that I was concerned about.”<sup>17</sup> Currently, when an individual school’s board of trustees — such as Henderson Intermediate — announces that they are considering their change in status, this has political implications for local schools. With the lack of a full consultation process by Henderson Intermediate, and the reaction of other schools affected (such as local secondary schools and contributing primary schools) this lead, in Crickmer’s opinion, to “a war between primary and secondary.”<sup>18</sup> A move towards middle school status “would disrupt our organisation [West Auckland cluster of schools] and split the community,”<sup>19</sup> he concluded.

Rather, Crickmer preferred to see:

Some Minister with [the] testicular fortitude to be able to say, “Okay this is what’s going to happen.” And then I think you [would see] the best solution to get middle schools going.<sup>20</sup>

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16. Crickmer (2002), p. 1.

17. Crickmer (2002), p. 2.

18. Crickmer (2002), p. 1.

19. Crickmer (2002), p. 2.

20. Crickmer (2002), pp. 6-7.

Therefore, his opposition to middle schools rested with the local political implications of one-off changes of school status at a time when he believed New Zealand should be moving collectively as a nation, educationally. Crickmer maintained that intervention in the middle school debate, by a Minister of Education is overdue.

### **3. Clover Park Middle School**

Clover Park Middle School is a four-year middle school, spanning Years 7 to 10, situated in Manakau City, South Auckland. The school was an intermediate school until it achieved a change in status in 1994. The school, with a roll of approximately 300 pupils in 2002, had only one Pākehā child enrolled. Clover Park caters specifically for the multiethnic population of South Auckland. The school's classification, as a decile 1 school, using the Ministry of Education's socioeconomic indicator, had the lowest classification possible. The school was built on an open-plan format and each of the four "pods" of classrooms was vertically grouped to cater for students from Forms 1 to 4 in each classroom.

Each pod, of three or four classes, provided for the needs of a specific cultural group. Teachers endeavoured to instruct in the first language of that culture and to meet the aspirations of that cultural community for their young. One pod catered for the Samoan community, one for the Māori community and the other two tended to be culturally mixed, although one worked predominantly with the Tongan community and the other with the Cook Island community.

The principal, Ann Milne,<sup>21</sup> has spent almost her entire teaching career in intermediate and middle schools. She began teaching in Northland and moved to Clover Park in 1983 as a scale A teacher. During her time there, she won a senior teacher position, responsible for one of the four teaching pods of classrooms. She then, spent time lecturing at Auckland College of Education and — on the retirement of the principal — applied for and won the position of intermediate school principal in 1994. Much of her teaching career has involved working with and meeting the needs of Māori students.

In 1990 a number of high achieving Māori students who had graduated from Clover Park the year before, arrived back. As Milne commented: “They’d either been suspended or were about to be, or were truanting or just fizzled out — and they had been our top kids.”<sup>22</sup> The school’s parent community used the new Parent Advocacy Council, set up under *Tomorrow’s Schools*, to put a case for these children to remain at Clover Park. The solution reached with the Ministry of Education was to create an attached unit, whereby these 24 students while they were enrolled at the local high school could, from 1991, attend Clover Park Intermediate School.

Unfortunately in 1993, while Milne was at Auckland Teachers’ College, the enrolments of these attached students were transferred to another high school. The secondary school principal of this new school wished to have a “higher degree of control”<sup>23</sup> of the programmes offered at Clover Park. In 1994 the Māori parents

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21. Milne, (2002) An interview with Anne Milne, Principal of Clover Park Middle School, unpublished interview. Appendix D.

22. Milne (2002), p.2.

23. Milne (2002), p.3.

again asked “why can’t we go back to doing what we were trying to do before – and become a Form 1 to 4 unit in our own right?”<sup>24</sup>

Since the early-1990s Milne had been reading research material concerning middle schooling philosophies and reported that she was particularly influenced by the work of John Sutcliffe, a Wellington principal and member of the New Zealand Intermediate Principals’ Association Executive, with whom she corresponded. The publication of the “lime green book”<sup>25</sup> offered her further access to educational research literature on the topic of middle schools. In April 1994, when approached by the Ministry of Education to submit an application for a change of class, (with only a weekend with which to prepare her application), she was unsure what the outcome would be. However, a letter from the Minister of Education, Lockwood Smith, arrived in July 1994 approving the change of class to middle school status for Clover Park School.

#### **4. Northcross Intermediate School**

Northcross Intermediate School is a decile 10 school of some 1130 students situated in a residential suburb of North Shore City, part of the Greater Auckland metropolis. The school opened as an intermediate school in 1970 and since that time there have been extensive residential housing developments in the area. The school also had a community of 46 fee-paying (international) students, in 2002. Owing to the large roll size of the school, Northcross offered a variety of different learning environments for students, including both mixed-age and separate-age classes. The school offered some eight specialist technology classes which were

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24. Milne (2002), p.3.

25. Stewart, D., & Nolan, C.J.P. (1992) *The Middle School: Essential Education for Emerging Adolescents*. Palmerston North: Massey University

divided into two cohorts of four technology subjects catered for on a ten-day timetable. With 36 classrooms, Northcross Intermediate was one of the three largest intermediate schools in New Zealand. The school population is close to the maximum size permissible for the grounds that are available.

Northcross has two neighbouring intermediate schools — Hibiscus Coast and Murray's Bay Intermediates — although both are some travelling distance away. Students move onto one of two local high schools, either Long Bay College with 1200 students or Rangitoto College with 3000 students. This area of the city is further served by four private schools that offer Year 7 and 8 education; Kristin School (with its own middle school), Carmel College, Rosmini College, and Pinehurst. The latter three all have intermediate departments. Two further high schools, Westlake Girls and Westlake Boys High Schools, have “flexible” zones that include students from this intermediate.

The principal, Trevor Rowse<sup>26</sup>, has been head of Northcross since 1986, and has spent almost 40 years in intermediate schools. This is his fourth principalship, which included having been principal of two contributing primary schools. Rowse described his time at Northcross:

We're lucky being in a school like this, with such a huge roll growth. I have upgraded everything, we have done everything we have wanted,[and] it has been a golden 18 years, absolutely. I'd wish it on everyone, we all need this, we would never have wanted to stop teaching.<sup>27</sup>

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26. Rowse, (2002) An interview with Trevor Rowse Principal of Northcross Intermediate school, unpublished interview. Appendix E.

27. Rowse (2002), p.8.

The area of the North Shore where Northcross is situated was involved in discussions concerning the establishment of a new school at Albany. The initial suggestion from the Ministry of Education was to establish an intermediate school. A strong lobby group, led by a local intermediate school principal, Fay Mason, proposed that the new school be a purpose-built middle school catering for Years 7 to 10. There was also some pressure on the Ministry of Education to build a Form 1 to 7 college. In late-2003 the minister, Trevor Mallard, announced that this new school, Appleby Road Junior High School, would open in 2005.<sup>28</sup>

Trevor Rowse was an articulate proponent of the philosophy and merits of intermediate school education. The reason he responded to this research request — regarding middle schools — was to provide a series of arguments in support of intermediate school education and to outline the possible negative effects any other structure of schooling may have on the educational provision for Year 7 and 8 students.

This interview involved a philosophical discussion of the strengths of intermediate school education, as it exists currently, and highlighted the possible areas of concern raised by the middle school movement. One of the outcomes of this interview was the need, in Rowse's opinion, for further analysis of each of the other structures of schooling that currently exists for this age-group before any one structure was adopted.

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28. Mallard, T. (2003, September 8). *Innovative new schooling for Albany students*. Wellington: Ministerial press release.

## **5. Tweedsmuir Junior High School**

Tweedsmuir Junior High School is a four-year middle school, spanning Years 7 to 10, situated in Invercargill and is the only middle school in the South Island of New Zealand. The school was an intermediate school until it achieved its change in status in 1997. In 2002 Tweedsmuir was a Decile 2 school, indicating a low socioeconomic community. The roll at the end of that year was 560 students, an increase over the opening middle school roll of 402 students. In that time (since 1997) three new schools catering for the same age-group of students had opened in Tweedsmuir's catchment area. As Alan Dennis<sup>29</sup> commented, Tweedsmuir was named a junior high because "there was already an Invercargill Middle School in the centre of town," however, the school follows a middle school philosophy.

Dennis has taught for much of his career in Southland and has been an executive member of the New Zealand Intermediate Schools Principals Association (NZISPA), as have all of the principals interviewed. He became "disgruntled that intermediate schools did not do the full job," rather there was, at national executive level "just talking about middle schools [they] didn't do anything [about them]"<sup>30</sup> In the early-1990s he joined the American National Middle Schools Association and after visiting the USA set up a teacher exchange with Seattle's Meeker Middle School in the Tacoma District.

This interest in middle schools led in the early-1990s to his exploring the concept of developing a middle school for the local community. This desire came from a deep dissatisfaction with the current provision of high school education in the

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29. Dennis, (2002). An interview with Alan Dennis Principal of Tweedsmuir Junior High School, Appendix C.

30. Dennis (2002), p. 1.

area. Dennis commented on being asked to speak to a local high school, 15 or 16 years ago, on the concerns parents had about the high school style of education.

He spoke on:

Work [that] had already been done, [the students] were in classes where the teachers didn't care, or teachers did not know their children. Single subject teachers taught large numbers of students and parents didn't feel welcome.<sup>31</sup>

Therefore, Tweedsmuir Junior High School, adopted many of the characteristics of an American middle school. The teachers teach and plan together with a good deal of emphasis of team teaching. The curriculum is integrated and the students are encouraged to present their learning to their parents at regular intervals. Peer assessment is encouraged “even the slowest students can make a comment on presentation,”<sup>32</sup> and students see good role modelling throughout the school. While the students are homeroom based they have daily numeracy and literacy lessons that are ability grouped. A good deal of responsibility is given to the Year 9 and 10 students who mentor the Year 7 and 8 students, lead houses, run assemblies and coach teams.<sup>33</sup>

In Dennis' experience the Ministry of Education were very helpful while the school made the change in class and have been supportive since. Similarly, the local high schools have been positive in the feedback they have given and he reported that Tweedsmuir's “Year 10 students are highly sought after by all the high schools in town.”<sup>34</sup> However, during the last five years the Ministry has restructured secondary education in Invercargill building a brand new multi-

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31. Dennis (2002), p. 2.

32. Dennis (2002), p. 4.

33. Dennis (2002), p. 4.

34. Dennis (2002), p. 5.

million dollar high school catering for Years 7-13 as near neighbours to Tweedsmuir. Also “the Ministry of Education (MOE) have established a Kura [Māori immersion school] down the road with a predicted roll of 550,”<sup>35</sup> moves which would not be seen by all principals as supportive of what this middle school had been trying to achieve.

One of the successes of the school, according to Dennis, was the quality and commitment of staff to the middle school idea. A number of Tweedsmuir staff, (Kay and Neil Potter) have completed postgraduate degrees based on the middle school model. Others have been published on the work that has occurred here (Brenda Shanks) and one staff member won a Beeby Fellowship to write up their experiences in team teaching (Neil Potter). Such academic support for the programmes being implemented has added to the quality of the programmes being offered to the students at Tweedsmuir, in Dennis’ opinion.

### **In summary**

Therefore, of the five principals interviewed, two principals initially indicated their opposition to middle schools and middle schooling. One principal’s opposition was based on the local political implications (Crickmer) and the other on philosophical grounds (Rowse). The thoughts, beliefs and opinions of these two principals added significant insights to the debate considered in this study. Of the three middle school principals interviewed, each came to the middle school movement from different personal beliefs and with different community expectations.

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35. Dennis (2002), p. 5.

Crone had a deep and abiding passion for middle schools, long before he became a principal. Milne had come to embrace the middle school philosophy primarily as a means to meet the immediate needs of the students and parents she was working with in her community, particularly those of her Māori community. Like Milne, Dennis came from an academic approach — through wide-reading and visiting the USA — to find a structure that offered more than the current intermediate and high school model was able to offer. While Crone had to persuade a predominately Pākeha Decile 9 university educated community of the merits of adopting the middle school structure, Milne and Dennis, by comparison, were persuaded to move in this direction to meet the needs of low decile communities. These three middle schools, and a fourth Sunset Junior High (which will be outlined in chapter 7), provide the data from which certain assumptions about a New Zealand middle school model will be based.

## A NEW ZEALAND MIDDLE SCHOOL MODEL

Since the first three middle schools were established in 1995, a total of eight middle schools have been formed in New Zealand. Much has been written about these developments in the New Zealand educational literature (Neville, 2002; Nolan & Brown 2002; Strachan et al., 1996, and Ward, 2001). A common thread in these writings has been the need for a philosophy of middle school education to be established prior to, or alongside, these first trial schools. Without a clearly articulated philosophy of middle school education, as Hargreaves<sup>36</sup> suggested in the English case study, then none of the infrastructural developments would be strong enough to sustain this change.

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36. Hargreaves, (1986).

First, biological, psychological and sociological research supports the concept of a period in human development, currently termed emerging adolescence. While some debate remains about the specific entry period and exit time from this stage of development that every human does progress through this phase appeared to have consensus in the research literature. Furthermore, the use of this developmental stage, emerging adolescence, to suggest the need for a specific structure of schooling, separate and different from what came before and what comes after, has its greatest support in the sociological literature. As Takanishi stated “adolescent behaviour is profoundly shaped by the way adults organize adolescent educational and social experiences.”<sup>37</sup>

Recent New Zealand middle school literature (NZISPA, 1995, 1996; Sutton, 1998) has supported Lipsitz’s suggestion that the move of the child from primary school to a middle school, of itself, creates a “rite-of-passage.” The move itself, acts as a defining moment for the start of adolescence. Those who stay in full primary schools, it’s inferred, are therefore denied the opportunity to make this transition and remain to be treated psychologically and sociologically as children while physically entering the stage of puberty and beyond. Similarly, two of the principals interviewed (Crone, and Milne) suggested that the timing of the transition to high school should be one of personal choice. This choice should be made when the stage of readiness has been reached by the individual to enter the adult world.

Other educational commentators (ERO, 2003; Lawton, 1998; Nolan & Brown, 2002) reiterate a similar point. If the period from Years 7 to 10 is broken by a

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37. Takanishi (1993), p. 459.

transition to another school, then these school structures are not catering for the specific needs of this age-group. As Lawton commented:

Instead of waiting for students to ‘half grow up’ then change schools at vulnerable times of their lives (from primary to secondary), it seems [to make] more sense to establish a specialized school setting within which to grow through puberty, to mature and become young adults.<sup>38</sup>

Or as Milne explained “I don’t think it’s [intermediate school] long enough and I think we’re cutting the kids off, you know, before they get to the end of that stage of development.”<sup>39</sup>

In the New Zealand context some educational commentators, such as the Educational Review Office (ERO: 2001, 2003) have suggested that the current structures of schooling for this age-group are less than effective in meeting the perceived needs of the emerging adolescent. The ERO reports commented that the needs of Year 9 and 10 students are the most poorly served by current school structures. Furthermore, that “the future role of middle schools in New Zealand needs to be considered in the light of the needs of all students from Years 7 to 10.”<sup>40</sup>

Nolan et al. (2000) have suggested that the reason for the establishment of the first eight middle schools was in:

response to the fragmented educational provision currently available [for this age group]. These appear to provide only second best educational structures and opportunities for emerging adolescents.<sup>41</sup>

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38. Lawton (1998), p. 14.

39. Milne (2002), p.5.

40. ERO (2001), p. 51.

41. Nolan et al. (2000), p.1.

For many educationists it is the seeking of an improvement in individual achievement that is the paramount driver for a change in school structures. As Lipsitz (1997) commented:

When children help each other interact positively and work together, their actions tend to create environments in which emerging adolescents develop more positive attitudes to learning and achieve significantly better at their school work.<sup>42</sup>

This is a comment echoed by Crone when he said “at the end point [it is] the growth of the individual rather than passing examinations... but the [secondary school] structures get in the road of people being able to actually work.”<sup>43</sup> This theme, of structural misfit with the need to ensure improvement in individual achievement, is reiterated in Nolan and Brown’s (2001) work when they stated:

While school systems organized in terms of the primary-secondary distinction more or less effectively socialize children, they are less effective in educating them. This is because educational goals, which vary markedly for children in different developmental stages, require a greater diversity of educational models, methods and approaches than school systems, organized bi-modally can provide.<sup>44</sup>

Neil Potter (2001a, 2001b) continued this idea when he stated “whereas intermediate schools are geared to meet the needs of the 10-12 age-group, most 13 and 14-year-olds, do not possess the skills to cope with the competitive, academic focus of secondary schools with [their] emphasis on specialization and compartmentalization.”<sup>45</sup> Nolan and Brown (2001) suggested that “in a nutshell the focus of schools that want to work more effectively with emerging adolescents should be less on being “secondary” or “primary,” and more distinctly on being an

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42. Lipsitz (1997), p.11.

43. Crone (2002), p. 4.

44. Nolan et al. (2000), p. 2. paraphrasing Wiles and Bondi (1993).

45. Potter, N. (2001b.) Team teaching in the middle school: Critical factors for success. *Set: research information for teachers* , p. 27.

educational place for students in the middle.”<sup>46</sup> The need to consider the emerging adolescent age-group as an entirety, Years 7 to 10, has added sociological importance to the development of stand-alone middle schools for New Zealand.

## DEFINITIONS OF A NEW ZEALAND MIDDLE SCHOOL

At the inaugural conference of New Zealand middle schools (May, 2000) the recommendation was passed that an agreed statement describing the purpose of middle schools in New Zealand be drafted. The definition contained in the agreed statement, as quoted by Potter (2001b), stated: “Middle schools are ‘stand-alone’ schools that are specifically designed to meet the needs of young adolescents from 11 to 14—years-of-age.”<sup>47</sup> This statement, however, omitted intermediate schools *per se*, due to its emphasis on a middle school of three- or four-year duration.

While this statement explained how middle schools might achieve this goal, in the process it added nothing significant to a New Zealand understanding of middle schools. The statement suggested that middle schools were successfully able to meet the learning needs of emerging adolescents “through teachers who know their students well, [who] address[ed] their academic, physical, cultural and social needs in a safe homeroom environment.”<sup>48</sup> This did little more than to state the obvious and could have been a definition of any full primary classroom. Secondly, middle schools were successful by offering “learning opportunities that provide[d] a balanced curriculum and incorporate[d] the best practices of student-centred

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46. Nolan & Brown (2001), p. 28.

47. Potter (2001a), p. 43.

48. Potter (2001a), p. 43.

learning, often in a team teaching situation.”<sup>49</sup> Similarly, this identified nothing new or innovative and was merely a general statement of good intermediate school practice. Finally, the third point raised by this statement suggested that, through providing “a flexible curriculum that offers meaningful learning experiences, and [that] meets the needs of individual students, supported by age-specific resources,” middle schools were in some way unique. One would assume, however, that this would be the aim of every school regardless of the age of its students.

This first attempt (since that of Stewart and Nolan in 1992) at setting a definition of middle schools unique to New Zealand, was disappointing. In the following year, however, Nolan and Brown (2001) described middle schools as:

Independent Year 7-10 middle schools, or a relatively autonomous middle school located inside or adjacent to a larger school (e.g. a year 7-10 middle school alongside a Year 11-13 senior college), are the preferred form of school provision for emerging adolescence.<sup>50</sup>

This description clearly reinforced the idea that Year 6 was not part of the middle school system and that middle schools should, in the opinion of these researchers, be four-years in duration. Furthermore, this description recognised one of the important aspects of the New Zealand educational environment. This description suggested that other school structures that wished to create “middle schools” could do so within their existing structures, so long as the new middle school structure had a high degree of autonomy. The term these researchers used for these middle schools was that they were “ring-fenced” from the rest of the school.

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49. Potter (2001a), p. 43.

50. Nolan & Brown (2001), p. 26.

Nolan and Brown added three further criteria that they considered to be important aspects of middle schools.

The first was that this new structure, to be called a middle school, must implement middle schooling educational philosophies and practices. These, they suggested included among others; holistic curriculum programmes, active, interactive and inquiry-oriented pedagogy, dedicated student guidance and counselling and flexible timetabling. This definition clearly stated that middle schools needed to follow a middle school philosophy, a theme which will be developed in greater depth later in this chapter.

Secondly, Nolan and Brown suggested that middle school boards of trustees should appoint academically qualified teachers with strong disciplinary and interdisciplinary interests. While one would assume that this would be a priority in any school, no matter the age-group, it does reiterate a specific issue identified in the ERO (2001) report. The ERO report stated that a mix of primary and secondary trained teachers had a role to play in staffing intermediate schools<sup>51</sup> and likewise, therefore, middle schools.

The third point that Nolan and Brown identified as crucial was the leadership of these schools. Middle schools required principals committed to the value of middle school educational precepts and principles. This point is further supported by the international research on school leadership (Elmore, 2000; Hipp, 1987). Neville (2002) also reached a similar conclusion that “the site-based management

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51. ERO (2001), pp. 24-25.

principle in New Zealand enables high flexibility in structure and curricula.”<sup>52</sup>

With a great deal of site autonomy and the significant effect of the personality of a leader on the development of the school, a high commitment is required from that leader to maintain the philosophy and practices of the middle school, according to Nolan and Brown.

Nolan and Brown’s definition was more robust than the earlier attempt by the 2000 conference. From other research, however, a number of further aspects of effective middle schools could be gathered in support of a definition of an uniquely New Zealand middle school. Consequently, before analyzing these in greater depth the question of grade-span needs to be addressed more fully. Of the seven middle schools currently, six have a grade-span of Years 7-10. The one exception, Berkley Normal Middle School, has a grade-span of Years 7-9.

#### A NEW ZEALAND GRADE-SPAN DEFINITION

As found in national and international research there was little agreement among the five principals interviewed concerning the number of years a middle school should cover, or which age-groups could be included. All five interviewees agreed, however, that some form of middle school structure was more desirable than any other of the current alternatives, either Full primary schools or Form 1 to 7 colleges.

Berkley Normal Middle School, as already stated, adopted a three-year structure to give the school a beginning, a middle, and a final year, ideally with an equal

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52. Neville-Tisdall, M. (2002). Pedagogy and Politics in New Zealand’s Middle Schools. *Middle School Journal*, 33 (4), p. 50.

number of students enrolled at each level. John Crone remarked “I reckon 250 [students] in each group would be okay...But it would be just as good if we had 200, 200 and 200 - you still need mass, a certain critical mass.”<sup>53</sup> By comparison, Clover Park Middle School adopted a four-year model, as did Tweedsmuir Junior High School, spanning Years 7 to 10. Ann Milne commented:

I guess there is room for two, three and four-year Middle Schools and we need to get our heads around what that means, what the options are and what that means for kids first and foremost.<sup>54</sup>

David Crickmer suggested that the two-year intermediate school could also be considered a middle school, so long as the philosophy underpinning the school was a middle school one. By this he suggested it had a homeroom base and some subject specialization.<sup>55</sup> Along with Ann Milne, he was concerned that many intermediate schools were not following a middle school philosophy currently and that too many intermediate schools were adopting high school type structures and systems.<sup>56</sup> However, if there were to be a national move to four-year middle schools — apart from one or two reservations concerning the fourth formers (Year 10) — Crickmer would be willing for his school to change. As he stated “if they all went from Form 1 to 4, I would go with it.”<sup>57</sup>

While Trevor Rowse was satisfied with the current two-year format of intermediate schools, he conceded that “a three-year programme would sit well

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53. Crone (2002), p.17.

54. Milne (2002), p.9.

55. Crickmer (2002), p.3.

56. “I think we have to ask ourselves if what we do in Intermediates replicates what exists in Secondaries now, then what’s the point really in us existing?” Milne (2002), p.10.

57. Crickmer (2002), p.1.

alongside the [current] two-year cycle.”<sup>58</sup> However, his ideal three-year grouping would be one encompassing Years 6, 7 and 8 because students in these three years tend to be less negative. Students have not reached the level of maturity and independence that is more common at the Year 9 and 10 level.<sup>59</sup> As with the other respondents he was critical with what was happening in secondary schools, qualifying this statement with the observation that “anything is better than a college education [Form 1 to 7] for these kids. I don’t care whether it is intermediate or a middle school or any other alternative, Form 1 to 4 seems a pretty good group in terms of David’s [Stewart] studies.”<sup>60</sup> It is noteworthy, that Rowse was the only interviewee to support the inclusion of Year 6 (10-year-olds) into a middle school structure.

Rowse also raised the point that in most middle school structures, proposed currently that it would be the Year 8 students who would become the forgotten year group. As he suggested “Form Four would be active, service, hands on, farming or working. This seems a good argument for Form 1 to 4 but then the Form 2s would be the lost children.”<sup>61</sup> In Rowse’s opinion, one of the strengths of the intermediate school structure was that it provided the Year 8 students with a leadership role. After a year at the school these students then step into a leadership role and provide role models for the new students entering the school. The possibility of this valuable role being lost existed in both a three-year and a four-year middle school model. Many of the arguments Rowse raised in opposition to the middle school hinged on his passionate support for retaining the existing

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58. Rowse (2002), p.6.

59. Rowse (2002), p.6.

60. Rowse (2002), p. 7.

61. Rowse (2002), p.6.

intermediate school model. He believed that a well-functioning intermediate school provided an exciting, stimulating middle school learning environment without having to “buy into” the problems that could exist if the duration of time spent at the school was increased by one or two years.

Each of the five interviewees, also, had strong opinions concerning the placement of Form 4 students within the New Zealand education system. These students, currently perceived to be the “lost children” of the New Zealand education system, have created some of the most passionate debate in the national media. At Clover Park Middle School, these students make up the fourth and final year at this school. Milne believed that their presence was a positive influence on the other students:

For us, here, the fourth formers are absolutely crucial... In terms of their maturity levels and development in the third and fourth form, our fourth formers are wonderful you know, and looked upon by the other groups as real role models. I think they develop a lot of leadership in that year and a lot of confidence in themselves.<sup>62</sup>

However, at Berkley Normal Middle School, with its focus on the child and allowing the child time to develop, John Crone claimed that “there’s a big difference between a 14-year-old and 15-year-old.”<sup>63</sup> Crone referred to his visit to the United States in 1997 where he listened to the educational debate concerning the ideal year level for children to finish middle school and begin high school. The philosophy underpinning Berkley Normal Middle School’s three-year structure Crone described in the following terms:

I don’t want any child in our school to think that they can get a Driver’s Licence while they’re at school. I don’t want any child

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62. Milne (2002), p.5.

63. Crone (2002), p.8.

in our school to actually say “I’m within a few months of being a cool 16 – and therefore I’ll just speed up because I look more mature” and to bring those pressures back into the school.<sup>64</sup>

Middle schools, in Crone’s assessment, provided safe places for children where the pressures of the peer group are managed and students do not have to grow up too quickly. For those students who do wish to experiment with being a young adult then the correct path for them is to make the move to high school. For those who wish to treasure their childhood years and to make the most of them academically then time at a three-year middle school is time well spent, according to Crone.

For Dennis the fourth form gave an opportunity for his students to sit the School Certificate examination, a year earlier than is usual. Those students who did, scored exceptionally good grades and for Dennis these results provided one justification for their middle school structure.<sup>65</sup> Lee and Lee (1998), in their criticisms of the grade-span debate in New Zealand, questioned the placement of Year 10 students in a middle school when they face the external examination — then of School Certificate — now of level one NCEA in Year 11. However, all three middle school principals believed that their students would be ready for these examinations. This confidence in middle school students being prepared for the examinations in Year 11 was also borne out by Richard Ward’s research at St. Andrews Middle School.<sup>66</sup>

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64. Crone (2002), p.8.

65. Dennis (2002), p.3.

66. Ward, R. (2001). *The development of a middle school*. Unpublished doctoral dissertation. University of Waikato: Hamilton, N.Z.

The two principals from intermediate schools were also keen to comment on the place of fourth formers in middle schools. Crickmer was unsure about the placement of fourth formers but stated that if this was how a new national middle school movement was to be designated then he would respect it.<sup>67</sup> Rowse, however, preferred to have New Zealand middle schools develop into Years 6 to 8 institutions because he saw a natural link and similarities existing across these three age levels. Furthermore, he stated “I hate to think that they [Form four] would actually be the role models I want although they might well be if they are the top of the school.”<sup>68</sup> Rather, Rowse preferred an alternative programme of learning be set up for this age-group, one where “the school should have a camp, half the school goes February to June... they do service and sports and things and then they have a sort of physical hands-on [experience].”<sup>69</sup> In particular Rowse was concerned with the social consequences of having older fourth form students in the same school with younger girls “I worry about putting big kids with the younger girls, the girls are so mature these days.”<sup>70</sup> However, if the alternative schooling structure was a Form 1-7 College, then his preference was to see the Form four students as leaders of the middle school instead of having the younger Year 7 and 8 students mixed in with the older college students.

Nolan et al. (2000) suggested that while emerging adolescents could be educated in schools with either a three or four-year grade-span they preferred “four-year grade-span schools as they might afford Year 10 students [an opportunity] to experience leadership roles and enhanced learning in a way that is infrequently the

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67. Crickmer (2002), p.1.

68. Rowse (2002), p.5.

69. Rowse (2002), p.5.

70. Rowse (2002), p.6.

case now.”<sup>71</sup> While the issue of grade-span has not been fully resolved in the New Zealand context, if middle schools are to proceed as a national structure then all claims to Year 6 students need to be reconsidered. Any claim to Year 6 students would place middle schools in direct competition to primary schools. This would occur at the same time as the Year 9 and 10 students would place middle schools in conflict with secondary schools, as has occurred in recent times. While significant data exists to suggest that Year 9 and 10 students are not being well catered for by current New Zealand school structures, similar research does not exist for Year 6 students.

Furthermore, a four-year structure rather than a three-year structure appears to be the most ideal model. The four-year model provides for the completion of a general education prior to preparation for the examination oriented senior high schools on to which all middle school students progress. The success of the primary tradition — generalist education in preference to the junior high school — specialist secondary tradition also appeared in the late-1990s to have been the preferred structure for New Zealand middle schools.

## MIDDLE SCHOOLS NOT JUNIOR HIGH SCHOOLS

Both Crickmer and Crone emphasized that middle schools were not, in their opinion, junior high schools. They considered the structure of schooling — where each teacher is a specialist and shifts from class to class during the day — to be a junior high school model rather than what they envisaged occurring in a middle

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71. Nolan et al. (2000), p.15.

school.<sup>72</sup> Crone went further when he suggested that the middle school programme was different from both the primary and secondary systems of education; that it was a unique form of schooling for this age-group.<sup>73</sup> He cautioned that a middle school did not involve merely adding Year 9 or Years 9 and 10, onto an existing intermediate school. What was required, he commented, was that the middle school philosophy, style and structure permeate all levels of the school and enrich the experience for all of the students. In Crone's view, a middle school environment ensured that “[everyone] gets given a whole enriched environment of resource[s] and opportunity.”<sup>74</sup>

Therefore, he opined, an intermediate school can be a middle school “if its run right, if the philosophy of the leader is similar.”<sup>75</sup> Furthermore, he recognised that middle schools were going to be “different between one community and another.”<sup>76</sup> All five respondents maintained that there was a valuable place for middle schools, in the New Zealand educational environment, particularly for those institutions following clearly delineated middle schooling philosophies.

### **School organisation and resourcing**

One of the key points proponents of middle schools (NZIMSA, 1995, 1997; Nolan& Brown, 2002) have suggested to explain the need for middle schools to be stand-alone institutions, is the factor of school autonomy. Emerging adolescents require a curriculum and teaching methods better suited to the learning needs of their age-group. Therefore, to ensure that this occurred the entire

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72. Crickmer (2002), p.2.

73. Crone (2002), p.15.

74. Crone (2002), p.17.

75. Crone (2002), p. 7.

76. Crone (2002), p.7.

school organisation needed to be focused on meeting these unique needs. For example, as early as 1981, Alexander and George outlined the need for the reorganisation of both time and space to make the middle school conducive to the learning needs of emerging adolescents.

Nolan et al. (2000) quoted from an extensive Californian research study carried out by Braddock et al. (1988) that found “a departmentalised school organisation tends to inhibit both the academic and social development of young adolescents. On the other hand school organisation which features homeroom teaching and interdisciplinary staffing arrangements tend[ed] to foster both aspects.”<sup>77</sup> The inference made was that the departmentalised structure of secondary schools was least favoured when compared with the homeroom structure of middle schools. Hough (1997) supported such an inference and suggested that “exploratory classes or enrichment experiences are provided [in middle schools] to allow students a chance to experiment with novel subject matter and interest areas without fear of being penalised by a letter grade.”<sup>78</sup> The perceived organisational flexibility of middle schools based on primary school traditions outweighed any subject specialization advantage that might be gained from the secondary school tradition.

As Neville (1999) commented on the structure of Tweedsmuir Junior High:

The combination of a homeroom, [and] team teaching environment advantaged students in terms of pupil-teacher ratios and the reduction of stress and easing of workloads for the staff through shared planning and assessment.<sup>79</sup>

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77. Nolan et al. (2000), p.10.

78. Hough, D. (1997). A bona fide middle school: Programs, policies, practice and grade span configurations. In J.L. Irwin (Ed.), *What current research says to the middle level practitioner*. Columbus, Ohio: National Middle School Association, p.285.

79. Neville, M. (1999, October). *Case studies of exemplary practice in New Zealand middle schooling*. A paper presented to the National Middle Schools Association Conference, Orlando: USA, p.20.

A middle school that could organise flexible timetabling structures and permitted teaching in teams which were allowed to use blocks of time would best deliver an instructional programme for this age-group. While such arrangements are possible in a secondary school — or other structures of schooling — middle school researchers (Hough, 1997; Neville, 1999; Nolan & Brown, 2002) commented that this was least likely to occur.

In addition, stand-alone middle school institutions provided opportunities for resources to be specifically targeted to this age-group. Mollie Neville, in an address to the inaugural New Zealand middle schools conference, called this the “size-of-chairs” syndrome. Whenever she carried out research in full primary schools, invariably Year 7 and 8 students, to her recollection, were asked to sit on classroom chairs that were too small for them. Neville quoted other researchers that had variously commented negatively on; the size of toilet-pan seats, lack of appropriate sports’ equipment, heights of store-rooms and so forth. All these plant and equipment structures of full primary schools failed to cater for the physical needs of this age-group. Similarly, she commented on the negative impact of the need in secondary schools to maintain high student numbers in junior classrooms so that a wider range of senior options could be offered to smaller groups of senior students (a comment supported by Crone in his interview).<sup>80</sup>

As the English case study material outlined (chapter 5) the physical structure of buildings and rooms must suit the style of teaching that will occur inside it or little change in teaching techniques will occur. If the perceived needs of emerging

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80. Crone (2002), p.13.

adolescents are better catered for with team and collaborative teaching techniques, and inquiry based learning encouraging a greater degree of hands-on learning; (Barratt, 1998; Bishop, 2002; NMSA, 1995) then the physical structures of the buildings need to be modified to cater for these teaching strategies. Consequently, the purchasing of resources for middle schools needs to ensure that all the resources purchased meet the specific needs of the emerging adolescent. Where these students made up only part of the school structure they tend to receive only part of the resources allocated. However, in stand-alone institutions all resources can be targeted to the specific needs of this age-group. The school plant becomes subservient to the needs of the adolescent.

Within the New Zealand context the size of the school is also important. With emerging adolescents catered for in full primary schools in small rural areas (approximately 8% of Year 7 and 8 students)<sup>81</sup> recognition must be given to the reality that middle schools work effectively only when there are sufficient enrolments to ensure that staffing can provide a wide enough range of specialized and exploratory programmes. Owing to the rural nature of New Zealand, and the inequitable distribution of population, middle schools are probably only viable in larger population centres. The very issue that prevented the development of intermediate schools in rural areas, after Watson's 1964 report, may be equally relevant for the development of middle schools in the new century.

Further recent commentators on secondary school style education, Nolan and Brown (2001) made reference to the Freyburg Project. This study, undertaken in the late 1980s, trialled middle schooling techniques in a high school setting. This

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81. Education Review Office (2001), p.4.

study proved to be successful in highlighting the developments that can be gained by introducing middle schooling techniques to Year 9 and 10 students within a New Zealand high school. However, Nolan and Brown suggested caution if attempts were made to apply the Freyburg findings more widely. Although the possibility of a separate Year 7-10 middle school being established within a Year 7-15 secondary school existed, Nolan and Brown claimed that it would need to be “ring-fenced”<sup>82</sup> from the senior part of the institution. They proposed that this “school-within-a-school” would require “a full-time head of school, supported by interdisciplinary programme leaders for each Year group.”<sup>83</sup> The researchers concluded that any attempt to introduce middle school philosophies and practices into a school that was not designed to accommodate them could have a detrimental effect on the culture of that school as a whole.

In another article Nolan and Brown (2001b) warned against including Year 7 and 8 students in a high school setting because this “invariably result[ed] in students at the junior end experiencing inappropriate teaching and [a] lack of resources.”<sup>84</sup> They suggested that secondary school teachers with junior, middle and senior classes are “seldom able to put their high school focus fully aside when teaching younger students,”<sup>85</sup> and “deal discretely with the different instructional needs”<sup>86</sup> of these students.

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82. Nolan & Brown’s use of this term referred to two schools existing on one site with separate management structures, pedagogies and joint use of facilities. Nolan & Brown (2001a).

83. Nolan & Brown (2001a), p. 27.

84. Nolan, C. J. P., & Brown, M. (2001b, November). Educating students in the middle: Directions for secondary schools. *The Journal of the Secondary Principals’ Association of New Zealand*, p. 5.

85. Nolan & Brown (2001b), p.5.

86. Nolan & Brown (2001b), p. 5.

## **Staffing of middle schools**

A further resourcing issue is the provision of staffing for middle schools. In the New Zealand context there are two distinctly different teaching traditions; primary and secondary. As with the English case study the differences between these two traditions is greater than an issue of pay parity, a specific issue addressed in New Zealand during the late-1990s. Rather it is an issue of pre-service training, classroom teaching techniques and work-load expectations, philosophies and cultures of teaching. While middle schools require a degree of balance between child-centred pedagogy and subject specialization, how this is achieved on any one site becomes problematic.

One of the structural changes that needs to occur is in pre-service teacher training programmes. There is a need for courses to prepare teachers for teaching in middle schools and in-service professional development courses to refresh those already in such schools.<sup>87</sup> Many of the structural and curriculum requirements for effectively educating the emerging adolescent require teacher retraining and development. As Ann Milne commented, “the complexity of it [vertical grouping] means that teachers have to be very skilled at multi-level content delivery.”<sup>88</sup> Nolan et al. (2000) suggested that middle school teachers required “instructional command of more specialized and demanding curriculum than primary but be capable of employing a range of teaching methods and strategies [more] typical of primary than secondary.”<sup>89</sup>

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87. This recommendation is a theme common to Beeby (1938) p.242; Watson (1964) pp.426-427; and Stewart and Nolan (1992), pp. 66-68.

88. Milne (2002), p.6.

89. Nolan et al. (2000), p.10.

As well as especially skilled staff passionate about teaching this age-group the role of the principal is also crucial. Norton and Lewis (2000) have suggested that principals must know the personal and professional needs of their community of learners. Elmore (2000) noted that as well as this they also need to be able to provide effective leadership of both students and staff. As Nolan et al.(2000) summarised from their research, the principal must be “capable of developing a collaborative school culture (and a positive school climate) appropriate for this age-group and of developing staff and parent commitment to, and active participation in, that culture.”<sup>90</sup> Such leadership can rarely come from one person leading any of the alternative structures of schooling. This commitment requires a focus by principal and staff on providing for the needs of these students which can best be achieved in stand-alone middle schools. To attempt to meet such objectives in other schooling structures, such as in a school within a school scenario, could compromise the specific needs of the emerging adolescent.

### **Curriculum delivery in middle schools**

Much of the school structure and resourcing debate hinges on providing a school that can develop a curriculum specifically catering for the needs of the emerging adolescent. In Crone’s interview he spoke of constructivist theory and other researchers (Gannon & Whalley, 1975; Roeser et. al., 2000) commented on the learner becoming less a receiver of knowledge and more a sharer in the learning. Beane<sup>91</sup> in a number of articles wrote of the “responsive curriculum”, one which

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90. Nolan et al. (2000), p.9.

91. Beane, (1990) Rethinking the middle school curriculum. *Middle School Journal*, 21 (5), pp.1-5; Beane, (1991). The middle school: The natural home of the integrated curriculum. *Educational Leadership*, 49 (2), pp. 9-13; and Beane, (1995). Curriculum integration and the disciplines of knowledge. *Phi Delta Kappan*, 76 (8), pp. 616-622.

can meet the specific needs of this age-group. He wrote of a “democratic curriculum”, where the students have the opportunity to choose what they will study, the order in which it is studied and the responsibility to ensure that they have a say in what and how they learn (the concept of a negotiated curriculum). Beane has also supported the concept of an “integrated curriculum”, where certain topics and certain subjects can be developed and taught together as an alternative to the more usual individual subject orientation of secondary schools.

Curriculum, it is suggested (Beane, 1995; Moss & Fuller, 2000) should be taught through an interdisciplinary thematic approach in middle schools. Nolan et al. (2000) supported this argument quoting the work of Tarter, Sabo and Hoy (1995). These researchers suggested that there should be a shift in the locus of control for learning from the teacher to the student. The active participation of students will determine the content, pace and methods of learning and that the emerging adolescent preferred inquiry methods of learning by doing.<sup>92</sup> This curriculum delivery model suggested that:

Students permitted to explore diverse topics, interests and themes,[a] balance which develops students' understanding of the interdisciplinary nature of educational attitudes, knowledge and skills, opportunities to see relevance of school knowledge by applying it in a serious and practical way and well planned and directed learning activities enable all students to succeed.<sup>93</sup>

There was support among all five principals interviewed, that a middle school offered a much improved curriculum delivery model than that which exists currently in other school structures. Trevor Rowse commented that, a Form 1 to 4 (Year 7 to 10) grouping allowed for better integration of subjects and that many of

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92. Nolan et al. (2000), p.5.

93. Nolan et al. (2000), p.10.

the alternative programmes offered successfully in intermediate schools, could continue for a further two years,<sup>94</sup> if the middle school structure was adopted.

As a strong proponent of the homeroom system of education, Rowse related greater benefits in extending this homeroom approach for two further years while still allowing for a greater degree of specialization. Along with some increased specialization, the benefits of this form of education could also be offered to the Year 9 and 10 students.<sup>95</sup> Crone made a similar comment when he referred to the benefits of a middle school being applicable to all the students present. The example he quoted was his school's very successful drama department and its success in theatre sports in which all students participated, not just the Year 9 and 10 students.<sup>96</sup> In this example students in Years 7 and 8 also benefited from the additional curriculum provided for Year 9 and 10 students.

Milne referred to the seamless National Curriculum Framework and the opportunity this provided for students to be taught at their ability level. Milne further articulated the type of curriculum that a middle school, in her opinion, offered:

I think it would have a negotiated curriculum, which would cover issues young people face and want to know about. I think it would have a high level of involvement of the community and it would have opportunities for leadership in the whole range of areas. I think it would have strong pastoral support that would clearly understand and support the developmental stage of the young adolescent group. It would provide emotional support, look at the issues of bullying, look at the development of identity and relationships with others.<sup>97</sup>

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94. Rowse, T. (2002b) Further thoughts on Middle Schools. Unpublished paper, p.1.

95. Rowse (2002b), p.2.

96. Crone (2002), p.17.

97. Milne (2002), p.10.

Furthermore, Milne believed that the curriculum needed to be challenging to students and must provide for a range of learning strategies. Importantly, it would be culturally appropriate and eliminate as much as possible the differences between home and school for the students. While these curriculum ideals were not the sole preserve of the middle school, they were supported by the structures that they provided; such as a homeroom classroom, a feeling of belonging and connectedness, giving encouragement to children who were striving to become leaders and young adults, and being delivered at a time when the emerging adolescent was most interested developmentally in these concepts.

Crone also strongly supported the child-focused nature of a middle school curriculum. He went on to explain that he was concerned with the examination assessment structures that drive much of the curriculum and style of teaching in secondary schools. In particular he mentioned the long periods of waiting students had to endure until they were deemed ready to sit one exam or another. Crone described a group of students in one of the Year 9 classes (in 2002), who would be ready to sit School Certificate mathematics. In Crone's opinion, these students had reasonable prospects of passing but, due to the transition to high school in Year 10, would now have to wait a further two years, until Year 11, before being able to sit this examination.<sup>98</sup>

Crone further commented that much of the NCEA publicity mentioned "pathways" and that the middle school curriculum offered just that — an alternative pathway — that suited some students better than the existing uniformity

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98. Crone (2002), pp.9-10.

of the secondary education model. For each of the interviewees the issue of curriculum continuity and the methods of curriculum delivery were closely aligned to their philosophies of middle schooling. They were concerned with the child as learner and what they perceived to be the faults of the secondary school systems for curriculum delivery and assessment. Each saw that middle schools offered an alternative that would suit some children better than the current secondary model.

## THE STUDENT IN A MIDDLE SCHOOL

Much has been written concerning the needs of the emerging adolescent and earlier (Chapter 4, page 177) a number of taxonomies of needs were outlined. Sociological research suggested that these needs of the emerging adolescence, provided some justification for stand-alone institutions. Three of these needs concerned the emerging adolescent and their relationships with others.

### **Relationships with peers**

Roeser et al. (2000) commented that while the earlier work of Stanley Hall and others suggested that emerging adolescence was a time of “storm and stress,” in their research this did not appear to be the case. However, they were conscious of the fact that up to 50% of youth in this age-group were at risk of “engagement in high risk behaviour and activities that include[d] violence and vandalism, unprotected sex, abuse of alcohol and drugs, skipping and failing school and so on.”<sup>99</sup> This non-engagement with learning has, in recent years, become an increasing concern, particularly in most Western nations.

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99. Roeser et al. (2000), p.444.

In summary the argument proposed by middle school supporters was that success with schooling is more likely to occur by providing emerging adolescents with a larger peer group. By increasing the peer group size — the group they are most likely to listen too and interact with — in a middle school, and then developing a responsive curriculum to meet specific needs of this age-group — in a purpose-built school resourced to meet these needs — a range of specific adolescent needs are catered for. Within this context the educational programme could provide “emotional support, look at the issues of bullying, look at the development of identity and relationships with others,”<sup>100</sup> suggested Milne. For Dennis, middle schools provided an opportunity for appropriate leadership experiences to be offered including “heaps of responsibility for Years 9 and 10, mentoring the Year 7 and 8s. Leaders of houses, Year 9 run assemblies, thank visitors, coach teams,”<sup>101</sup> all of which he perceived to be authentic leadership opportunities for this age-group.

### **Relationships with significant adults**

Stand-alone middle schools would also require specialist support staff skilled in adolescent behaviour and needs. The development of effective counselling and advisory programmes would make middle schools unique from the current intermediate school structure. An advisory programme, working alongside a homeroom programme, suggested Nolan et al., (2000) would include a team advisory plan “stress[ing] the importance of self-concept and self-esteem linked to the learning programme.”<sup>102</sup> As Milne explained, this programme “would have

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100. Milne (2002), p.10.

101. Dennis (2002), p.4.

102. Nolan et al. (2000), p.13. (Citing NMSA,1995 and Kellough and Kellough, 1999)

strong pastoral care that would clearly understand and support the developmental needs of the young adolescent age-group.”<sup>103</sup>

The purpose of a strong homeroom and advisory programme is to establish close, trusting relationships between adults and peers. The challenge of middle schools would be to provide “teachers who knew their kids well, and their kids could relate to and the parents had a relationship with.”<sup>104</sup>

### **Relationship with the family**

A further crucial factor identified in this study concerning engaging emerging adolescent successfully with schooling was the maintenance of close contact with the students’ families. The engagement of the family with students’ learning was mentioned by two of the principals interviewed (Dennis, Milne). Intermediate schools, the principals suggested, because of their two-year span lacked opportunities to develop close parental contacts. Students came from strong nurturing primary schools — where they had attended for up to seven years — and then parents often felt uncomfortable making the same contact and involvement with a larger, two-year intermediate school.

As Milne commented “there’s much better continuity when there’s a four-year span. We now have a lot of families with more than one child in the school, so you have a buy-in from these parents for a lot longer period of time.”<sup>105</sup> Parents acted as resource persons, supervisors and consultants in the school as well as engaging meaningfully with the learning of their child. As Dennis commented, at

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103. Milne (2002), p.2.

104. Milne (2002), p.2.

105. Milne (2002), pp.5-6.

Tweedsmuir the “students present learning to their parents, this is far more meaningful learning, acting and living their learning.”<sup>106</sup> For Milne this relationship with the home was further enhanced when it recognized the cultural heritage the child brought with them to school. The middle school programme “would be culturally responsive and would eliminate the difference between home and school for students who are not from the dominant majority [ethnic] group.”<sup>107</sup>

Both Crone and Milne expressed the view that middle schools appeared to better suit the preferred learning styles of Māori students, than do secondary schools. Milne came to embrace the philosophy of middle schooling because of her Māori community. In the initial years at Clover Park (1991 to 1994) Māori intermediate students, who were often very successful at school, were turned off learning in their first two terms at secondary school and wished to return to the intermediate school they had come from. What then, was it about the intermediate school that helped these learners to be successful in comparison to what was offered at their local high schools? Milne provided the following explanation:

Māori parents .... were asking for the one significant adult or a group of significant adults that the kids knew well. They wanted teachers who knew their kids well, and their kids could relate to and the parents had a relationship with. They wanted them to be secure and - the whanau environment was the way they described it. We've done a lot of talking with our parents about having a greater length of time[at school] and all those sorts of things, you know, service to the community, becoming much more involved in the school with the kids. So, all of those things they wanted as well as firm discipline.<sup>108</sup>

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106. Dennis (2002), p.4.

107. Milne (2002), p.10.

108. Milne (2002), pp.2-3.

At Clover Park the decision to provide a culturally safe environment for these Māori students was extended to embrace other ethnic groups. Many parents and their children did not expect schools to reflect their culture; they had come to think that their ethnic background did not matter to teachers in the school system. Milne claimed that one's identity (who I am) and the development of individuals as learners underpinned much that made the middle school philosophy special:

I think the whole issue of identity, you know, the development of identity and who you are, is particularly difficult for kids who are either Maori or from minority cultures in our New Zealand system.<sup>109</sup>

For a school whose roll was 99% Māori and Pacific Island such issues were crucial. However, Berkley Normal, with a Māori roll of some 16% found very similar evidence. The middle school structure appeared to suit the Māori students and their parents “in particular, [to] the Māori students, [it] has appealed, and they are the ones that disproportionately choose to stay on at Year 9 in a very European environment.”<sup>110</sup> While Berkley maintained its decile 9 status, many of the Māori families travelled past other local schools to enrol there. One of the overriding reasons why the Māori students choose to stay as Year 9 students, in Crone’s opinion, was because they felt comfortable and respected. Crone believed that these Māori students enjoyed the non-violent non-physical environment of the school. These students wished to remain engaged in school and in learning but found that the pressures on them, when they entered secondary school, were too great and they stopped achieving to meet the strong demands of the secondary school peer group.<sup>111</sup>

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109. Milne (2002), p.5.

110. Crone (2002), p.2.

111. Crone (2002), p.11.

Neville (1999) commented that this emphasis on cultural identity, in her research, was unique to the New Zealand middle school movement:

The contingent of intermediate and middle school principals, which I accompanied to the NMSA conference in Denver late 1998, were unanimous in voicing their concern that the literature and practice in other countries did not appear to take into account the culture of minorities as it does in New Zealand.<sup>112</sup>

Similarly, the research work of Russell Bishop (2003)<sup>113</sup> on the Year 9 and 10 project for raising Māori student achievement levels drew very similar conclusions in his study. Māori students wish to form strong personal relationships with significant adults with whom they relate well to. Bishop's research indicated that significant improvements in Māori student achievement can be achieved if the curriculum is adapted to meet their learning needs for; hands-on experiences, group work, negotiated curriculum, collaborative teaching, and more thorough planning and assessment by teachers. While these results are still in the early stages it would appear that schools that adopt these "middle school" techniques are, in fact, positively improving the achievement of all students and not just those of Māori.<sup>114</sup>

## CONCLUSION

From the research material available, both in the international arena and in New Zealand, the foundations for a uniquely New Zealand middle school can be discerned. For purely pedagogical reasons it seems that a New Zealand middle

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112. Neville (1999), p. 9.

113. Bishop, R., Berryman, M., Tiakiwai, S., & Richardson, C. (2003). *Te Kohitanga: The experiences of year 9 and 10 Maori students in mainstream classrooms*. Ministry of Education: Wellington.

114. Bishop, R. (2002). Anecdotal information shared at Mokoia Intermediate School Teacher Only Day January 29<sup>th</sup> 2002 as part of the Year 9 and 10 Project Pilot- phase two that the school had been involved with.

school would be a stand-alone institution of either three-or-four year duration, though preference would lie with four-years to provide opportunities for student leadership to develop. These middle schools would serve the needs of emerging adolescents in larger centres of New Zealand as a crucial size of about 500 students is required to provide both the exploratory and specialist programmes considered desirable. A grade-span of Years 7 to 10 would best meet the needs of the emerging adolescent, while also fitting most effectively within the existing New Zealand structures of schooling. In smaller rural communities a four-year middle school “ring fenced” within a larger secondary school could be an effective compromise.

Ideally, these schools would be led by principals with strong academic understanding of the philosophy of middle schools, and be staffed by teachers with a passion for this age-group. Teachers would ideally come from pre-service teacher training programmes that prepared them for middle school teaching and from both primary and secondary schools. Effective in-service professional development programmes would support the ongoing development of teachers while teaching in middle schools.

Teachers would be supported by specialists trained in emerging adolescent counselling and mental health needs. Together, in a homeroom and advisory programme, the specific needs of this age-group would be catered for. Teachers would work in teams; planning, teaching and assessing an integrated, responsive curriculum with significant input from the students concerned. Multilevel ability grouping would be encouraged. A wide variety of different high-level thinking

teaching strategies would be evident. Much of the work would be constructivist in nature, be inquiry-based and encourage hands-on methodologies.

Close links with parents and caregivers would be maintained with students encouraged to engage their parents in their learning. Links with the community would be established, community service and adult mentoring programmes would be developed as would effective transitioning programmes with contributing primary and senior high schools. As the middle school would, by its nature, be larger than most primary schools — and probably geographically distant from the student's home — recognition of leadership opportunities and mentoring of the Year 7 and 8 students would be crucial in the development of Year 9 and 10 programmes. Similarly, the effective recognition of and support for the cultural backgrounds of all students, would enhance family involvement with the school. This then, is what would make the New Zealand middle school model unique.

Why then has the development of such middle schools in the New Zealand context remained so problematic? Chapter 6 will investigate the political issues surrounding the establishment of middle schools, and the interest groups who have been opposed to the development of such a schooling structure, in the New Zealand educational environment. For the development of any school structure is not only pedagogically motivated but also owes equally to the political influences surrounding its development.

## **Chapter Six**

### **Politics of Middle School Development**

#### **INTRODUCTION**

As argued in the previous chapter the foundations of a pedagogically supported middle school structure evolved during the twentieth century. However, the creation of seven independent state middle schools in New Zealand during the period 1993-1998 due to its problematic nature needs to be analysed within the context of educational politics. This chapter examines a number of national political movements that impacted on schools in general in the 1980s and 1990s, and assesses the extent to which these political developments provided a climate conducive to the growth of middle schools in New Zealand. Finally, the relationship that existed between educational politics at the local and national level will be explained from the perspectives of the five school principals interviewed as part of this research.

It is generally accepted that any discussion of the political nature of New Zealand education during the late-1980s and early-1990s cannot ignore the ascendancy of New Right philosophies. Yet many Western industrialised nations introduced very similar philosophies, all of which owed much to the work of international economists, such as those of the Chicago School (Hayek et al.).<sup>1</sup> Somewhat surprisingly, perhaps, this New Right, neo-liberal orientation was adopted regardless of the philosophical backgrounds or the political persuasions of the governments involved. During this period both National and Labour governments

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1. Olssen, M. (1996). In defense of the welfare state and publicly provided education: A New Zealand perspective. *Journal of Education Policy*, 11(3), p. 338.

occupied the Treasury benches, as did one National- New Zealand First coalition government (1996-1998).

This chapter identifies a variety of viewpoints on the highly politically charged issue of “globalization,” wherein new ideas are imported or gathered from the international community and then transplanted into New Zealand, regardless of their appropriateness to our particular situation. This discussion is followed by an examination of some of the methods by which a “community of ideas” can be introduced and developed into public policy, with special reference to three case studies of middle schools.

Chapter six identifies three major components of the neo-liberal paradigm that have had a major impact on the development of public policy in education, and analyses their theoretical heritage and implementation in the educational sector. The first is choice theory, which is derived from a human relations model. This depicts the individual as a rational being able to make valid decisions apart from the society of which she or he is a part. The market model, in which all human relations are explained in economic terminology, is then examined. Finally the notion of central control is explored, in which governmental control is maintained while the rhetoric of devolving responsibility from the centre is being actively promoted. Together, these three components provide a useful overview of the politics of education of the 1990s.

Following this investigation the present chapter will examine the following question; To what extent did these major political trends influence the

development of the middle school movement in New Zealand? Such an analysis is followed (in chapter 7) by a detailed middle school case study of Sunset Junior High School, in Rotorua. The later study provides valuable insights into both micro and macro level education politics which are discussed in this chapter and which reveal the relationship that existed between educational policy rhetoric and middle school development. The educational policies and practices that form this case-study do not of course exist in isolation from the wider politics of education.

As Roger Dale noted perceptively:

The more we confine ourselves to the level of education politics — that is, to policies and practices that are clearly of direct and immediate relevance to education policy and practice — the greater the risk that we will neglect the level at which the agenda for education politics is set, that of the politics of education.<sup>2</sup>

## THE POLITICS OF EDUCATION

Dale has concluded that it is valuable to begin with the larger “macro” scenario of international educational politics, and their appearance and development within the New Zealand educational community, before investigating the policies and politics that apply to a specific case study. The consequences of the various economic crisis of the 1970s — with England entering the European Economic Community, the oil crisis of the mid-1970s, and the collapse of communism in the early 1980s, — for the development of the New Zealand economy are now matters of historical fact, as was the election of a Conservative government under Margaret Thatcher in the United Kingdom and the equally conservative Republican government of Ronald Reagan in America. Each of these events have

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2. Dale, R. (1999). Specifying globalization effects on national policy: A focus on the mechanisms. *Journal of Education Policy*, 14 (1), p. 8.

been referred to by many commentators in order to explain the worldwide resurgence of a neo-liberal, right wing approach to government.

This school of neo-liberal economic thought emerged in America at the beginning of the 20th century, and was closely associated with the University of Chicago, the so-called ‘Chicago School’. This movement was led by pioneering economic researchers such as Friedrich A. von Hayek.<sup>3</sup> From 1984 the dominant Keynesian economic and social policy theories associated with the concept of the welfare state, were displaced in many governmental circles (e.g. England and America) by what could be considered a “third wave” of development of neo-liberalism. Within the international literature this development has often been labelled the “New Zealand experiment”. The result was that this interpretation of public policy — and, in particular, of educational efficiency and progress — led to economics becoming the dominant social science.

From 1984, with the election of the fourth Labour government, New Zealand policymakers and government ministers increasingly began to adopt an economic philosophy based on the New Right theory of neo-liberalism. This was scarcely surprising, as Halsey et al. (1997) commented, because “there is now a consensus on both the left and right of the political spectrum which has defined education as the key to future economic prosperity.”<sup>4</sup> The history active promotion of this New Right philosophy in the New Zealand context is readily apparent after the election of the Lange Labour government in 1984 and the appointment of Sir Roger Douglas as Minister of Finance. In September 1987, for example, the New

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3. Olssen (1996), p.338.

4. Halsey, A.H., Lauder, H., Brown, P., & Wells, A.S. (1997) *Education: Culture, economy and society*. Oxford: Oxford University Press, p.7.

Zealand Treasury produced a two-volume publication titled *Government Management: Brief to the Incoming Government*, the second volume of which concentrated specifically on education. In this volume the Treasury officials confidently asserted “that education should be more responsive to business interests and to the needs of the economy.”<sup>5</sup> Furthermore, the Treasury document stated categorically “that education shares the main characteristics of other commodities traded in the marketplace, and that it could not be analysed successfully as a ‘public good’.”<sup>6</sup> The authors went on to outline the merits of devolving control over the administration and governance of education in the following statement: “under central planning mistakes are more likely, less easy to rectify and more costly.”<sup>7</sup> They concluded that, “government intervention and control has interrupted the ‘natural’ free-market contract between producer and consumer with all that entails for efficient and flexible producer responses to consumer demand.”<sup>8</sup>

As a comprehensive statement on the perceived deficiencies of the then current New Zealand education system, the Treasury Report was both wide-ranging and wholly in keeping with the philosophies of the New Right.<sup>9</sup> This document was presented to the Labour government in the same month as the Taskforce to Review Educational Administration had prepared their report *Administering for Excellence: Effective Administration in Education*, (The Picot Report) which was released publicly in April 1988. The Picot Report echoed sentiments which were

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5. New Zealand Treasury. ( 1987). *Government Management: Brief to the Incoming Government, Volume 2: Education*. Wellington: Government Printer, p. 27, cited in Olszen (1996), p.338.

6. New Zealand Treasury (1987), p. 33, cited in Olszen (1996), p.338.

7. New Zealand Treasury (1987), pp. 40-41, cited in Olszen (1996), p. 338.

8. New Zealand Treasury (1987), p.41, cited in Olszen (1996), p.338.

9. The concept of the devolution of responsibility but not of power can be found also in the 1984 Treasury Report to Government on Education.

not at odds with those of Treasury. The first of four significant conclusions reached by the Picot Taskforce was that the present administrative structure of education (the Bowen model) was over-centralised. Therefore, the Taskforce recommended that national objectives and clear responsibilities and goals had to be in place, all of which would empower “individual learning institutions [as] the basic unit of education administration.”<sup>10</sup> They also suggested that “[there] should be a partnership between the teaching staff (the professionals) and the community.”<sup>11</sup>

While the Picot Report offered the promise of partnership, and community and parental participation, in an historical context it was simply part of a wider international process of educational “reform” which for example coincided with the introduction of the British Education Reform Act (1988). Many of the New Zealand administrative “reforms” throughout the 1990s had a global aspect; similar decisions were being made by dissimilar governments at different ends of the political spectrum, and by different countries at a similar time. For this reason a number of writers (Codd, Gordon, & Harker, 1997; Waslander & Thrupp, 1995) perceived globalisation to be a common thread within the development of public policies, notably in education. The effect of globalisation on the development of educational policies is examined in the present chapter.

The Picot Report was followed in August 1988 with the Labour government’s own discussion document, *Tomorrow’s Schools: The Reform of Education*

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10. The Taskforce to Review Education Administration. (1988). *Administering for excellence: Effective administration in education*. (The Picot Report). Wellington: Government Printer, pp. xi-xiv.

11. Picot (1988), pp. xi-xiv.

*Administration in New Zealand*. In so doing the Minister of Education and Prime Minister, David Lange, presented what was to become the third foundation document to support a New Right shift in educational administration in New Zealand. *Tomorrow's Schools* was the government's response to the challenges issued by the Picot Report. Both these 1988 publications targeted structural reform as the key element needed to achieve meaningful educational reform. They presumed that once the structure of education was revised then everything else would fall into place. Several educational commentators have argued that these texts (the Picot Report and *Tomorrow's Schools*) were in fact "ideological texts that [could] be used to legitimate political decisions."<sup>12</sup> While there were a number of other documents published during the 1990s (such as *The New Zealand Curriculum Framework*, 1993 and *Education for the 21<sup>st</sup> Century*, 1993, by the Ministry of Education) these merely added detail to the plan outlined in the three previous documents to establish a new direction for educational reform. However, it is important to note that there was a shift away from administrative reform towards curriculum concerns once the administrative structures had been revised.

The first of the Labour government's educational reforms of the late 1980s involved the community in local schools to a greater extent than previously through the removal of the provincial Education Boards and the creation of individual Boards of Trustees for each institution. (This could be viewed as an endorsement of the Board of Governors' model evident in high schools.) *Tomorrow's Schools* adopted what could be considered to be a *Janus* position, in that it advocated, on the one hand, the devolution of power from the central

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12. Codd, J., Gordon, L., & Harker R. (1997). Education and the role of the state: Devolution and control post-Picot, cited in Halsey et al. (1997), p.263.

institution (the Department of Education) and the regional Boards of Education — specifically to empower local communities — while, on the other hand, it advocated a market model in which there was a devolution of responsibility but not of power. Before explaining selected aspects of neo-liberal theory further, an investigation of the influence of global developments on the politics of educational theory and practice in New Zealand needs to be undertaken.

## GLOBALISATION AND EDUCATION

The influence of global developments on education and schooling has been noted by a number of theorists (Ball, 1998; Brown & Dale, 1999; Jones, 1998; Lauder, 1997; Olssen, 1996) in the educational policy studies arena. These global influences, researchers have contended led to the creation of at least four public policies that include, among others: a reduction in state intervention in education, the promotion of parental choice of schools as a viable public policy, the growth of market philosophies in education, and a strong centralist control element being articulated through a national curriculum. Ball et al. have claimed that each of these developments is related, and that each is part of a specific global movement in the arena of public policy.

Furthermore, these researchers have inferred that considerable inter-relationships exist between these four public policies and that each possesses and shares some political features. Within the strand of parental choice, for example, there exist such potentially controversial issues as, school autonomy, school-community partnerships, and the pursuit of a philosophy of individualism. Under the umbrella of market philosophies can be found issues to do with managerialism and

accountability, self-managing schools, and the philosophies of school efficiency and school effectiveness. By comparison, with reference to the concept of curriculum reform issues relating to the provision of a seamless education, the place of traditional school structures, and the current use of state regulation to support curriculum policies can be identified as having an overt (and covert) political dimension.

Before examining the politics of education of the 1990s, therefore, it is necessary to gain a broader understanding of the New Zealand educational environment immediately prior to these “reforms”.<sup>13</sup> Before 1989, the nature of New Zealand schooling had been shaped substantially in 1939 by Peter Fraser’s statement (as Minister of Education and Deputy Prime Minister), that it was “[the right of] every person, whatever his level of academic ability, whether he be rich or poor, to [have access to] a free education of the kind for which he is best fitted.”<sup>14</sup> School-based education was to be delivered as a public good, mediated through the public service — notably, the Department of Education. The concept of “learner as citizen” was, not surprisingly, a key philosophy in this policy.<sup>15</sup> Such a comment was reiterated in the press in 1999,<sup>16</sup> when Peter Calder, in an article on dental care for teenagers, cited a comment by an Auckland dentist that, when university tuition for dentistry was free, dentists were willing to treat teenage patients although government subsidies for this treatment were low. Once the cost

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13. See chapter 1, p.80-81.

14. P. Fraser (1939), quoted in Hattie, J. (2002, September). *Why do intermediate schools exist in the 21<sup>st</sup> century?* Paper presented at the New Zealand Association of Intermediate and Middle Schools Conference, Hamilton, p.10.

15. This was reflected in the *Thomas Committee Report* (1944), which mentioned the importance of educating adolescents as future “Worker[s], neighbour[s], homemaker[s], and citizen[s].” See Department of Education. (1944). *Report of the Committee appointed by the Minister of Education in November, 1944.* (The Thomas Report). Wellington: Government Printer, p.5.

16. Calder, P. (1999, June 11). Dental care for teenagers. *New Zealand Herald*, p. 12.

tuition had reached \$100,000, dentists no longer felt obligated to treat teenagers at government subsidised rates. The idea that the provision of a “free education” created a specific relationship between individuals and the state clearly underpinned this concept of the learner as a citizen. According to this analysis, such a sentiment had been lost under recent reforms in public policy, certainly within the field of dental care.

Amongst the key principles of the New Zealand education system, until 1989, were the following: that education was substantially free to all citizens, that everyone had the right to attend his or her nearest educational institution, and that access to education was relatively unrestricted. Furthermore, conventional wisdom suggested that New Zealand education was of a high standard, and that governmental policies were premised on it being predominantly a public good. Consequently, New Zealand teachers generally, and primary teachers specifically, shared a reasonably similar vision of their task. Teachers worked in mostly child-centred ways, considered themselves to be part of the professional class within New Zealand, and were supported administratively by a system of regional education boards.<sup>17</sup> There was generally a high degree of educational consensus (publicly, at least), and open discussion of educational issues was encouraged in public forums, for example the Educational Development Conference (E.D.C.) nationwide meetings of 1973-1974. The powerful education boards were matched by equally strong primary and post-primary teacher unions who perceived their role to be that of professional bodies; that is, they wished to have considerable input into educational policy and development across all schooling levels and

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17. Educational boards were introduced in the New Zealand provincial era (1853-1876), and were retained under the Bowen system of education administration (from January 1, 1878, until October 1, 1989).

areas of the country, as well as fulfilling the traditional union role of supporting workers' rights.

By the mid-1980s this model of education was under increasing attack, from the Treasury, among other organisations, for being highly-centralised and overly bureaucratic.<sup>18</sup> The strong, central Department of Education, working with its regional officers and inspectorates, created an environment where individual schools had little autonomy or freedom to introduce innovative practices.<sup>19</sup> The high degree of conformity and consensus, these critics claimed, also led to a lack of voice for the parents and communities within which schools existed. Inequalities between low and high socioeconomic areas, and Māori and non-Māori pupils, were but two concerns, which were allegedly poorly addressed by this centralised system of education. The educational process was seen to be too slow to respond to international issues and changes, especially to the changing economic base of New Zealand's industries. On a practical note, the vast majority of New Zealand schools had been built at least 30 or more years previously, and they were now requiring urgent and expensive renovation and repair work. This was a cost that was difficult to justify because of the falling populations evident in many communities.

It was in this educational environment that the "reforms" of the 1980s were cast in New Zealand. It was an environment that was heavily influenced by the perceived needs and demands of a so-called global community. Several commentators (Caldwell & Spinks, 1992; Lange, 1988) who have written about

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18. The Treasury Report to Government. (1984) on Education (Volume, 2) is one example of this sort of attack, as Olssen (1996), p.338, has observed.

19. Picot, B. (1988), p.xi.

politics of education argue that the global situation created a need within New Zealand to become more responsive to these perceived economic pressures. The investigation of the ways in which various policies were imported into the public policy arena is a crucial aspect of the present study of the politics of education.

As the rapid growth in telecommunications has proven, New Zealand does not stand in isolation from the rest of the world. A number of education theorists (Ball, 1998; Brown & Lauder, 1996; Jones, 1998) have outlined a theory of globalization and the effects of global factors on subsequent New Zealand developments. While “the ‘globalization thesis’ can be used to explain almost anything and everything,”<sup>20</sup> as Ball shrewdly observed, it remains an important component in the study of the politics of education at the later end of the twentieth century. As Philip Brown and Hugh Lauder have explained, “the significance of globalization to questions of national educational and economic development can be summarised in terms of a change in the rules of eligibility, engagement and wealth creation.”<sup>21</sup>

A definition of globalisation which emphasises the economic dimension to the construct, is further developed in the work of Phillip Jones, who commented:

In essence, globalization is seen [by academic commentators] as economic integration, achieved in particular through the establishment of a global marketplace marked by free trade and a minimum of regulation.<sup>22</sup>

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20. Ball, S. (1998). Big policies/small world: An introduction to international perspectives in education policy. *Journal of Comparative Education*, 34 (2), p.120.

21. Ball (1998), p.119.

22. Jones, P. (1998). Globalization and internationalism: Democratic prospects for world education. *Journal of Comparative Education*, 34 (2), p.143.

Jones attributes the development of a theory of globalization to the communications and information revolutions that have occurred in the last decade, as well as to the increased mobility of people, goods and services in and around the world. This dynamic of international policy importation linked to the assumption that there is a wider global programme that countries such as New Zealand must fit, is based on an understanding that it is *people and ideas* that are exchanged, rather than an agenda being set from outside.

Stephen Ball outlined a continuum of global influences ranging from the “flow of ideas through social and political networks: the international circulation of ideas,”<sup>23</sup> which have been present for most of the 20<sup>th</sup> century, to the involvement of various groups and individuals who sell their particular solutions in the academic and political marketplace, through to the enforcement of particular policy ‘solutions’ by multilateral agencies.<sup>24</sup> While the latter end of the spectrum involves a certain degree of compulsion, Ball explained that most global effects were more often interpreted than directed through the implementation process. The influence of such agencies as the World Bank, Asia and Pacific Economic Cooperation (APEC), the International Monetary Fund (IMF), and similar organisations on New Zealand’s economic policy direction requires extensive economic and social science research. Not surprisingly, perhaps, the development of “conspiracy theories” relating to pre-set, rigid neo-liberal agendas and suchlike lies at the extreme end of this spectrum.

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23. Ball (1998), p.123.

24. Ball (1998), p.124.

For his part, Ball identified two policy agendas that he attributed to the global arena: “the first aim[ed] to tie education more closely to national economic interests, while the second involve[d] a decoupling of education from direct state control.”<sup>25</sup> These two agendas form the basis of much of the discussion about globalization. In a similar vein Mark Olssen has claimed that, encouraged by such international organisations as the World Bank, “growth in government was halted in most western advanced economies, [and] the privatisation and commercialisation of the public sector began.”<sup>26</sup> In addition, Taylor et al. (1997) pointed to a stronger New Right influence in the growing momentum of the globalisation process:

Globalization has become an ideology, proselytised by international organisations such as the OECD and the World Bank in assertions of the need for less interventionist and leaner government and for freer forms of economic competition between nations.<sup>27</sup>

While emphasis was placed understandably on the 1974 OPEC oil crisis and the effect this had on most of the Western economies, Olssen suggested that it was the collapse of the communist regimes of Eastern Europe, and the subsequent collapse of communism, that tainted respectable “left thought” in western nations. There is broad theoretical agreement, however, that the form that restructuring has taken in each of these developed countries has been different. The common motivating force, many commentators argue, comes from the international economic community and their agencies. The importation of New Right ideologies is identified by most of these theorists as being the most identifiable part of this globalization movement of the 1990s. At one end of the spectrum of global

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25. Ball (1998), p.125.

26. Olssen (1996), p.338.

27. Taylor, S., Rizvi, F., Lingard, B., & Henry, M. (1997). *Educational policy and the politics of change*. London: Routledge, p.78.

studies, writers such as Andy Hargreaves (1997) went so far as to state that “in many respects, the globalization of economic life is coming to mean that the nation state as a separate economic, political and cultural entity is under threat and in decline.”<sup>28</sup>

While some globalisation theorists have been united in reporting that New Right policies were imported into western economies, others are less emphatic that globalization has had such a direct role to play in policy creation. Roger Dale (1999), for example, questioned the nature and extent to which national policies had been influenced by “global” factors. He suggested that these influences were far more indirect than previously thought, and that the ways that globalization affected national policy in itself added to the diverse effect it had. Dale was adamant therefore that “globalization cannot be reduced to the identical imposition of the same policy on all countries.”<sup>29</sup> In other words, he maintained that globalization did not represent one type of influence within a nation. For example:

The impact of globalization can occur at different levels of national societies, such as the regime, sectoral (e.g. the education system) and organisational (e.g. schools, or educational bureaucracies) levels; and that the effects of globalization are mediated, in both directions and in complex ways, by existing national patterns and structures.<sup>30</sup>

Notwithstanding the above reservations, the development of a public policy for education in New Zealand had clearly been, to some degree, shaped by the global influences that occurred at the later end of this century. These influences —

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28. Hargreaves, A. (1997) Restructuring restructuring: Postmodernity and the prospects for educational change. In Halsey, A. H., Lauder, H., Brown, P., & Wells, A. S. (Eds.). (1997) *Education: Culture, economy and society*. Oxford: Oxford University Press, p.342.

29. Dale (1999), p.2.

30. Dale (1999), p.3.

whether created by economic crises, production and supply problems, the oil markets, or the collapse of the communist nations — led to a growth in New Right or neo-liberal philosophies. These have had a significant impact on the development and orientation of public policy. While the degree, the intensity, and the level at which these influences may have occurred are matters of continuing debate, that they did occur appears to be generally accepted. The aim of these New Right philosophies, then, was to reduce the involvement of government in education and to tie the aims of education more closely to the perceived economic needs of the nation. In this New Zealand has not been alone among western nations, but arguably it has been among the more enthusiastic in embracing these new influences in the public policy forum, particularly that of education.

## NEO-LIBERAL THEORY AND EDUCATION

As stated previously, neo-liberal advocates believed that all individuals were economically self-interested, and that each rational individual was able to make the best judgement about his or her own interests and needs. Such thinking contrasted sharply with welfare state theories of the collective good which, neo-liberals suggested, tended to create indolence and slothfulness. Under neo-liberalism then, the state was concerned with creating individuals who were enterprising and entrepreneurial in their relationships. The state was charged with the task of creating marketplaces with laws and institutions that operated in an economic manner. The clear implication of this state involvement is, however, that no totally free market can exist: some state intervention could not be dispensed with altogether.

From this neo-liberal public policy platform, certain key trends emerged in the educational arena. Carter and Neil (1995)<sup>31</sup> outlined the creation of a new relationship between politics, government and education in complex westernised post-industrialised countries. They identified five main elements from this new orthodoxy. The first was an improvement in the economic performance of these nations by tightening the connections between schooling, employment, productivity and trade. Neo-liberal policies and practices made a strong connection between wealth creation and the active promotion of choice of schooling, Carter and Neil declared, although other researchers have contested this (e.g. Thrupp, 1998; Whitty, 1998).

Second, Carter and Neil claimed that outcomes in employment related skills and competences had been enhanced under neo-liberalism, and they subsequently identified a reduction of costs to government associated with education. Each of these elements supported a case for a market model to be implemented in education. Furthermore, Carter and Neil declared that governments needed to maintain more direct control over curriculum content and assessment. Finally, increasing community input into education through involvement in school decisionmaking and also through the positive pressure exercised by market choice was to be encouraged, they concluded.<sup>32</sup> The introduction of a commercial model of human inter-relationships ought to be applied to any activity, including schools, Carter and Neil confidently asserted.

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31. Carter and Neil (1995), cited in Ball (1998), p.121.

32. Carter and Neil (1995), cited in Ball (1998), p.122.

These five elements will be arranged in this chapter into three interrelated trends that had a significant impact on the development of middle schools in New Zealand. The first trend is the concept of parental choice, the second that of the market philosophy, and third, the perceived need for greater central control of the school curriculum. In the New Zealand setting these three trends reveal the ways in which neo-liberal theories have been implemented in the education arena, and how they impacted on the creation of middle schools during the 1990s.

### **Parental choice**

A key tenet of neo-liberal theories was the assumption that each individual has the ability to make rational, well-informed decisions about his or her involvement in society. To this end Hugh Lauder (1987) noted that:

There are two doctrines which combine to furnish the New Right with a view of human nature: both can be traced back to the seventeenth century and to the political theory of Hobbes. He developed the view that human beings are possessive individuals who are “essentially the proprietor of their own person or capacities owing nothing to society for them.”<sup>33</sup>

In both the Picot Report and *Tomorrow's Schools* particular emphasis was given to the right of parents, among other people, to make choices. Under the heading of “Specific Issues,” the former document referred to the expectation that Māori people have to be educated in “the Maori language, in an environment that reflects Maori values and uses Maori forms.”<sup>34</sup> Furthermore, it was presumed that “the exercise of choice will be enhanced if zoning provisions are modified [i.e. removed];”<sup>35</sup> and that choice extended to parents who sought to home school their

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33. Lauder, H. (1987). The new right and educational policy in New Zealand. *New Zealand Journal of Educational Studies*, 22 (1), p.4.

34. The Taskforce to Review Education Administration (1988), p.65.

35. The Taskforce to Review Education Administration (1998), p.77.

sons and daughters. To this end the Taskforce reported: “We have proposed more assistance to parents who want to educate their children themselves.”<sup>36</sup> Similarly, in the *Tomorrow’s Schools’* document, choice was related to enrolment schemes, Māori students, home schooling, and then a new category “Withdrawal from Existing Arrangements.” In the latter instance, groups of parents representing 21 or more students could “withdraw from an existing institution and set up a separate one if the particular educational needs of their children cannot be met locally.”<sup>37</sup> These two documents outlined ways in which education could become more responsive to the individualistic philosophy of neo-liberalism, albeit without overt reference to this paradigm.

Within the neo-liberal construct education was considered to be a private good, and as a consequence individuals had the right to choose how they would access that good. As a corollary to this perspective each individual had to (in some form) pay for this right, as part of the philosophy of “user-pays.”<sup>38</sup> In the wider educational arena this led in the 1990s to an increase in tertiary education fees for students, the increase in school fees during the compulsory years of schooling, and to increases in add-on costs that were no longer provided by central government.<sup>39</sup> The notion of individualism and choice theory fit into the larger thrust of neo-liberalism in that these two forces are seen to lessen the economic burden of education on the government’s finances. As Anthony Welch observed:

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36. The Taskforce to Review Education Administration (1998), p.77.

37. Department of Education (1988). *Tomorrow’s Schools: The reform of education administration in New Zealand*. Wellington: Government Printer. Section 5.5, p.37.

38. The new right educational policy is premised on two fundamental principles. The first, consistent with a concept of the possessive individual is the view that education is a private good and should therefore be paid for by the individual. See Lauder (1987), p.10.

39. The intentions were to...”promote access, parental choice and diversity among education providers, which [is] blurring traditional boundaries between services (primary school, secondary school and tertiary) and changing institutional structures.” (Ministry of Education, 1997, p.8).

One of the common corollaries of this approach is that, given the assumption that it is individuals that reap the benefit of their investment in education, they themselves should bear the costs.<sup>40</sup>

This support for individual choice and freedom developed from a further tenet of neo-liberalism, that of equity. In the middle school context, advocates of middle schools have used the tenet of equity whenever they outlined a case for a particular form of schooling to meet the specific needs of emerging adolescent boys and girls. For example the claim that middle schools can cater “for the particular needs of emerging adolescents and able to offer flexibility to timetabling and curriculum options hitherto not attainable,”<sup>41</sup> may be seen as consistent with a desire to promote equity between schools. Coupled with this belief in the individual’s right to choose is the belief that each individual school should have autonomy. According to this argument, if parents are able to choose how they wish to educate their children then each institution must have a strong degree of autonomy in order to meet those needs. The issue of school autonomy is a highly politically charged one, as demonstrated later in this chapter (see p. 321). Nevertheless, it is reasonable to suggest that the abolition of zoning advocated in both the Picot Report and *Tomorrow’s Schools* was seen as much in the context of increasing school autonomy,<sup>42</sup> as it was in increasing parental choice.

There is ample evidence to conclude that over the last decade several prominent academics (e.g. Anderson, 1998; Levin, 1998; Whitty, 1997) have been less than enthusiastic about the gains that parental choice purportedly secured with respect

40. Welch A. R. (1998). The cult of efficiency in education: Comparative reflections of the reality and the rhetoric. *The Journal of Comparative Education*, 34 (2), p.158.

41. Ward, R. (1997).The middle school dilemma: Issues about curriculum delivery for Years 7-10. *Teachers and Curriculum*, 1, p.54.

42. The Taskforce to Review Education Administration (1988), p.17.

to the development of effective educational programmes. Their initial criticisms stem from the belief that rational individuals will make informed choices. To this end Taylor et al. (1997) concluded:

Clearly, not all parents have the same capacities to make choices; choices are constrained by a complex range of material, cultural and social factors. In contrast, the market view assumes that choice is simply a matter of the individual preference, unaffected by cultural living and social and material conditions.<sup>43</sup>

Recent research clearly indicates that the exercise of choice is determined by the parents' own education and cultural capital, as Philip Brown (1990) has noted:

Market critics, on the other hand, usually argue that choice will be limited to parents with greater material capital and appropriate cultural capital who are able to capitalise on the income and knowledge in exercising choice.<sup>44</sup>

Other critics of choice theory, such as Gary Anderson (1998), suggested that while parents may be able to make rational choices within their own individual school, this limits the transaction to a purely market one. As a result, the wider social obligations of educating citizens are ignored. Anderson continued:

Furthermore, by framing participation as parents making rational choices for their own children, it is assumed that only those with a direct stake in schools (i.e. parents with children currently attending a local school) should participate. This limits schooling to being the equivalent of a consumer *product rather than being a social institution charged with broader social objectives to serve a wider community of citizens.*<sup>45</sup>

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43. Taylor et al. (1997), p. 88.

44. Waslander, S., & Thrupp, M. (1995). Choice, competition, and segregation: An empirical analysis of a New Zealand secondary school market, 1990 to 1993. *Journal of Education Policy*, 10 (1), p.440.

45. Anderson, G. L.(1998)' Toward authentic participation: Deconstructing the discourses of participatory reforms in education. *American Educational Research Journal*, 35 (4), p.584. (Authors emphasis)

Anderson was critical of the rhetoric that disenfranchised groups would gain more of a voice; according to choice theory. He outlined his thesis in the following manner:

Ostensibly, participation in decision making is intended to provide more opportunities for disenfranchised groups to have a greater voice in organisational life, but too often the opposite occurs. Participation becomes a form of collusion in the sense that it reinforces the power of groups with similar interests.<sup>46</sup>

Among the arguments for supporting education reform in New Zealand was the allegation that Māori parents and students were disenfranchised by the older bureaucratic (Bowen) model, and the claim that the new model would allow Māori a more effective say in the education of their people. But critics of the new reform strongly suggested that this may not have, in fact, occurred. Māori engagement with schooling, using such measures as attendance, continuation of schooling, tertiary access and so forth, have indicated that no major change occurred over the period of these reforms.<sup>47</sup> An exception to this trend can be found in Anne Milne's comments concerning strong Māori parent and student support for middle school education at Clover Park Middle School<sup>48</sup> (as explained later in this chapter).

### **Market philosophy**

The concepts of individual choice and the autonomy of schools were directly related to the development of a market philosophy engendered by the neo-liberal theories of the late-1980s. All aspects of education became increasingly recast in

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46. Anderson (1998), p.580.

47. Bishop, R., Berryman, M., Tiakiwai, S., & Richardson, C. (2003). *Te Kohitanga: The experiences of year 9 and 10 Maori students in mainstream classrooms*. Ministry of Education: Wellington.

48. Milne, A. (2002), p.2.

economic terms, and the terminology of the marketplace assumed prominence in the educational policy arena. The education sector, as with all government services during the 1990s, was expected by Parliament to be increasingly accountable in economic and fiscal terms. According to a market theory model (Waslander, 1991; Whitty, 1997; Woods & Bagley, 1996), learners were recast as “consumers” and “clients,” which represented a shift from a citizenship model toward a consumer one. The citizen in a nation state had certain rights and duties; specific responsibilities existed in a constitutional relationship, all of which were held together by a hierarchy of laws. In the consumer model however, all actions were perceived in terms of simulated markets, where attempts were made to resolve grievances and where the consumer was willing to pay for any service. Consequently, all concepts, relationships and educational ideas came to be reconceived in economic terms and terminology throughout the 1990s.

Each school purchased educational services from specific providers, and parents purchased schooling from their selected institution. Yet this devolution of funding only reached an intermediary stage because the practice of direct resourcing of teachers’ salaries was optional for schools. The long established practice of state provision of education therefore was lost in the development of a language of “economic rationalization,” whereby education was recast in terms of an economic vocabulary. However, as long as economic rationalisation depended upon the state as the funding source, a degree of state intervention could not be avoided.

In market theory, what determined quality was marketability. If something sold in the market then it was assumed to have quality. In the educational domain, therefore, a question frequently arose: "How does the education process aid the national economy?" As with most public policy areas, education had begun to be redefined primarily as an instrument to be used within the global economy. Various theoretical structures underpinned this movement. It is insufficient to merely call it a neo-liberal ideology, given that some theorists labelled this as representing a move from Fordism to post- Fordism. Mark Olssen, for his part, concluded that current education policy:

reflect[ed] the different technological, economic and political developments in the material structure of advanced capitalism. The character of work itself is changing away from mass production models towards individualised, flexible specialisation. This will result in short-term and frequently changing employment patterns.<sup>49</sup>

Other commentators described this development as a move from modernism to post-modernism, wherein the postmodernists would argue:

against the very idea of a central state on the grounds that such an institution is 'centrist' and 'totalistic' and cannot possibly claim to represent, let alone interpret, the needs and interests of the complex and multiple realities that constitute the social domain.<sup>50</sup>

Theorists also disagreed about the extent to which education had become fully market driven. Whereas the work of Phillip Woods and Carl Bagley (1996) outlined the elements of a market as involving:

Choice (consumers choosing between alternatives); diversity (the provision of alternatives); competition (producers striving to attract consumers to choose their service or product instead of

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49. Olssen (1996), pp.352-353. This concept is also quoted in the New Zealand government's August 1999 blueprint for reform, *Bright future: 5 steps ahead*. (Ministry of Commerce, 1999). Wellington: Government Printer

50. Olssen (1996), p.362.

those of other producers); demand driven funding (producers' income determined by the extent to which consumers want their service or product), and self-determination (separate producer-institutions being responsible for their own management.”<sup>51</sup>

Theorists such as Geoff Whitty (1997) suggested that education should be viewed in terms of a quasi-market because of the fact that parental choice and school autonomy existed along with a greater or lesser degree of public accountability and government regulation. Whitty also declared that if education operated like a full market model then a greater degree of “cream-skimming” would occur; that is, “clients” would be selected who offered greatest return for the least investment. He envisaged that “this would involve going for the middle of the market; [as] the gifted and those defined as having special educational needs will cost more to process.”<sup>52</sup> The reality was that schools currently tended to select their students on different criteria from this, which included a wide range of social and physical determiners not solely on socioeconomic grounds.

### **The “quasi-market” concept**

Brown and Lauder (1997) stated that the intention of the New Zealand educational “experiment” was to set up a quasi-market, at least within the confines of compulsory schooling. They argued:

In the case of education, where funding, at least during the compulsory school years, will come from the public purse, the idea is to create a quasi-market within which schools will compete. This approximation to the operation of a market is achieved by seeking to create a variety of school and a mixed economy of public and private institutions. In some cases they will aim at different client groups, such as ethnic minorities,

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51. Woods, P. A., & Bagley, C. (1996). Market elements in a public service: An analytical model for studying educational policy. *Journal of Education Policy*, 11 (6). p.644.

52. Whitty, G. (1997). Creating quasi-markets in education: A review of recent research on parental choice and school autonomy in three countries. *Review of Research in Education*, 22, p.14.

religious sects, or ‘high flyers’. This ‘variety’, it is argued, will provide parents with a genuine choice of different products.<sup>53</sup>

Although aspects of the concept of choice have been explored above, it is important to note that for choice to be effective there must be at least two relatively different options to choose between. The proclaimed advantage of the market philosophy was that it encouraged this differentiation to occur so that parents could perceive real differences between choices. At the same time the centralist pull of different government agencies, such as The Treasury, worked to negate this. Hence the term quasi-markets — those that have a degree of freedom but which involve institutions that are still accountable to a central agency — came into vogue. Within the New Zealand context this quasi-market perspective was evident, among other things, in “self-managing schools.”

### **Self-managing schools**

In the previous discussion about international policy importation and globalization, Ball’s notion of a continuum was outlined. Here, he stated that one of the ways in which international ideas arrived in a new setting was through “policy entrepreneurs;” groups and individuals who sold their solutions in the academic and political marketplace.<sup>54</sup> Such entrepreneurs ensured that a continuity of ideas occurred across national boundaries. This was most certainly the aim of Brian Caldwell and Jim Spinks who visited New Zealand in the late-1980s. They published two books *The Self-Managing School* and *Leading the Self-Managing School*. These works readily endorsed the neo-liberal reforms that

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53. Brown, P., & Lauder, H. (1997). Education, globalization, and economic development. In Halsey et al. (1997), *Education: Culture, economy and society*. Oxford: Oxford University Press, p.197.

54. Ball (1998), p.124.

occurred in New Zealand, and they described a market-based model that was intended to serve the newly self-governing educational institutions. Both the Picot Report and *Tomorrow's Schools* had considered the school to be the basic educational administration unit. Each school, through its charter, would form a partnership with its community, and this charter would also spell out the school's board of trustees obligations to a central Ministry of Education. Schools would establish boards of trustees whose members would determine how their school operated, while satisfying government regulations and requirements.

These regulations were published as an addendum to all charter documents in 1993, under the heading of *The National Education Goals and National Administration Guidelines*. The aim of a raft of legislative changes, enacted in a series of Education Acts and Amendments (1988, 1991, 1992, and 1993 and later), was to create autonomous schools and to prescribe the foundations for a new educational system in a market environment. Caldwell and Spinks (1992) explained the reasoning behind their support for autonomous schools in the following terms:

A self-managing school is a school in a system of education where there has been significant and consistent decentralization to the school level of authority to make decisions related to the allocation of resources. This decentralisation is administrative rather than political, with decisions at the school level being made within a framework of local, state or national policies and guidelines. The school remains accountable to a central authority for the manner in which resources are allocated.<sup>55</sup>

Advocates of self-managing schools favoured this structure because it allegedly allowed for increased community participation and collaboration. It was taken for

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55. Caldwell, B. J., & Spinks, J. M. (1992). *Leading the self-managing school*. Washington DC.: Falmer Press, p.4.

granted that those people within the organisation ought to have a greater say in what should occur and should be able to determine their own futures. Increased collaboration with parents and consultation with the wider community allowed for the organisation to be more responsive to the needs of its clients, proponents of this model believed. The criticisms outlined by The Treasury in their 1987 report could, in many ways, have been addressed by local problem-solving and responsiveness. Critics of this model (e.g. Anderson, 1988) outlined a larger issue however, that of the distancing of the central decision-making body from the realities of policy implementation in individual schools:

Decentralisation allows sources of conflict to be diffused throughout the system and provides additional layers of insulation between the state — or in the specific case of participatory, site based management, the school district — and the rest of the system.<sup>56</sup>

One of the more immediate results of the “post-Picot” legislative changes was the ability of boards of trustees to restructure the profile of their school population. As schools entered the new quasi-market environment, competition for students quickly became a serious issue. Because each student was allocated a funding weight by the central Ministry, increasing the number of students on the school roll became the most effective means to increase school revenue. But there were other factors to consider, in 1994 the Education Review Office (ERO) for example, noted that schools had attempted to meet the perceived needs of their students by changing their status:

Boards of primary schools which had no form one and two students have established form one and two classes; intermediate school boards have established form three

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56. Anderson (1998), p.578.

classes; and secondary school boards had established form one and two classes.<sup>57</sup>

Within the context of a quasi-market theory ERO's remark can be seen as somewhat naive, because competition for students — stimulated by a very real need to survive in what was often perceived to be an increasingly hostile environment — had become a strong motivating force. Small rural and inner-city primary school authorities saw a potential market in recapitation, so they chose to hold onto their older Year 7 and 8 students. In areas with falling rolls some secondary school authorities opted for the creation of Form 1 and 2 departments as a means to maintain staffing and resources. Between these two institutions were located many two-year intermediate schools whose governing authorities were faced with potential competitors on both fronts. "Self-managing schools", in the context of the 1990s, simply meant competition with one's neighbours so as to maintain access to funding and resources. Any serious discussion about what was educationally appropriate or desirable was effectively stymied by the new, harsh realities of the educational market-place. It was within this market-place that the "new" middle schools of the 1990s were formed.

The concept and practice of self-management of schools was also couched in the language of school effectiveness and school efficiency. Those commentators who supported a neo-liberal approach justified administrative reforms in terms of increasing the efficiency of both the education system and individual institutions. School effectiveness, and its ability to make a significant impact on those individuals who attended the organisation and on the community within which it

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57. Education Review Office. (1994). *Form One to Four : Issues for Students: Transition, Curriculum, Assessment and Discipline*. 5, Winter, p.3.

was based, was emphasised in the educational management literature. Much of this dialogue, too, was framed in economic terms, as Welch (1998) has suggested:

Just as natural resources can be sold in their raw state or have more value added by further development of the product, so too human beings are seen as having more or less value by virtue of their level of education and skills.<sup>58</sup>

It will be recalled that critics of the old administration system had maintained that it was overly bureaucratic. Consequently, it was assumed that the new system must, *per se*, be more efficient. However, as Welsh observed, “at the same time the public-sector is made increasingly captive to the argument that it must be run on business lines to be efficient.”<sup>59</sup> Those who sought to challenge the application of a business model to schools were quick to point out the narrow definition of efficiency that this model espoused and the fact that it ignored many other aspects that could be said to relate to a school’s efficiency. To this end Welch wrote:

Efficiency, however, is promoted at the cost of other considerations such as equity and the provision of service to the whole community, which thus means that the public-sector in education is progressively disempowered, since it is now open to the charge that it is no longer fulfilling its charter adequately.<sup>60</sup>

The drive to secure greater school efficiency and effectiveness could be seen to militate against the first two tenets of this reform, individual choice and market control. This was because this movement created a need for increased control over resources and management, by the central authority — in this case the government. In the “reformed society”, where education is seen to be associated with improved economic performance and competitiveness and where education authorities could assist the government by reducing public expenditure in the sector ‘efficiency’

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58. Welch (1998), p.158.

59. Welch (1998), p.159.

60. Welch (1998), p.159.

invariably required detailed systems of accountability. Efficiency gains must therefore be measured and preferably compared, requiring in Welch's words:

increasingly complex systems of appraisal of educational workers (teachers and academics) and a reduction in their professional autonomy, as their work is increasingly confined within systems of management, one of whose principal tasks is to increase productivity by forcing workers continually to do more with less.<sup>61</sup>

### **Accountability and managerialism**

The concepts of accountability and managerialism lie at the intersection of two of the conflicting tenets of neo-liberal reforms; market freedom and central control. Within self-managing schools there was a call for a “new” managerialism to be adopted. This was to involve a site based system that “stresses constant attention to quality, being close to the customer and [valuing] innovation”<sup>62</sup>. Poor performance was no longer attributable to a central authority, and no excuse, other than the management structures that existed on each individual site, was likely to be accepted or understood. Advocates of this reform downplayed the problems associated with implementing and monitoring complex educational and administrative process on 2700 individual sites (as was the case in New Zealand). Schools were expected to become increasingly self-managing while being requested simultaneously to deliver on a social engineering philosophy dictated by the central Ministry (in accordance with a National Curriculum Framework post-1993). In this way self-management extended to administration, but not to the curriculum which remained centrally prescribed.

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61. Welch (1998), p.172.

62. Ball (1998), p.123.

Neo-liberal arguments in favour of greater accountability and managerialism assumed that the raising of educational standards for all students was achieved simply by examining schools' management systems and improving the quality of teaching, irrespective of the nature of the school or its community. The New Right had not manufactured this argument, for the idea that "good teaching can make a difference" had long been part of teacher pedagogy and philosophy.<sup>63</sup> Nevertheless, the emphasis on effective teaching performance had created in the 1990s a new "politics of blame". Each school's activities were open to public scrutiny through the press and the review agencies that have been set up to maintain central control, such as the Education Review Office and the New Zealand Qualifications Authority. To this end, Martin Thrupp (1998) concluded that:

The politics of blame involves an uncompromising stance on school performance in which the quality of student achievement is seen as the result of school policies and practices and any reference to broader socio-political factors is ruled out as an excuse for poor performance.<sup>64</sup>

Whitty (1997), citing Cathy Wylie's 1995 report on self-managing schools, put the issue of managerialism into a clearer light when he commented that "in New Zealand, new forms of accountability and managerialism may still have "more form than substance" and that other practices and values can be, and often are, given priority at the "chalk face"."<sup>65</sup> By 1997 Wylie's further research into self-managing schools suggested that managerial accountability was operating on two levels; that of the principal to the board of trustees, and then the board to central

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63. Thrupp, M. (1998). The art of the possible: Organizing and managing high and low socio-economic schools. *Journal of Education Policy*, 13 (2), p.197.

64. Thrupp, M. (1998). Exploring the politics of blame: School inspection and its contestation in New Zealand and England. *Journal of Comparative Education*, 34 (2), p.196.

65. Wylie (1995), p.163, quoted in Whitty (1997), p.38.

government through “its accounts, annual reports and regular external review.”<sup>66</sup>

Interestingly, Wylie revealed that both boards and principals saw that their main accountability was towards students and not to the government agencies that funded them. This orientation arose partly because of the voluntary nature of trustees that distanced them from any model of formal accountability.

Wylie’s work has also demonstrated that within the New Zealand schooling situation, “accountability is a key element of what makes reforms work, but it is a professional rather than managerial or market (competitive) accountability.”<sup>67</sup> The third trend evident in the reforms of the late-1980s and early-1990s was that of increasing central control. Much of the discussion above points to a high degree of central control militating against the unfettered implementation of the market model, but the question still remains: To what extent was this really so?

### **Central control**

The political drive for administrative reforms included a desire to distance the centre (i.e., government and a centrally located education authority) from the pressures for innovation and change which it was hoped would be expressed at local and regional levels across the country. Furthermore, it was an attempt to lessen the constant demands on central government to increase resources in order to meet the increasing pressures on education (e.g. the provision of computers in schools as one example). The philosophy of parental choice and the introduction of a market model suggested the possibility of securing efficiency and effectiveness at reduced cost in terms of funding and resources. Nevertheless,

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66. Wylie (1997), p.177.

67. Wylie (1997), p.178.

authors such as Chubb and Moe<sup>68</sup> were adamant that these reforms had not gone far enough, having claimed for instance that “if public schools were freed from democratic control and bureaucratic constraints, and [were] instead regulated by the market, they could repeat the success of private schools.”<sup>69</sup> This assertion was of course, based on the assumption that private schools were by definition more successful than state institutions.

The first way in which central control can be (and has been) secured is through introducing (and modifying) a school curriculum. The reform movement in the administration of education related to the transfer of control, from the central to the local level, while one of the key elements of schooling, the curriculum, remained centralised. With the passing of the 1877 Education Act, New Zealand had adopted a centralised primary school curriculum. During the reforms of the early-1990s this curriculum prescription remained unchanged. Although the nature of primary and post-primary curricula changed with the National Curriculum Framework of 1993 on account of their reorganisation into seven “essential learning areas” the control exerted from the centre remained firmly in place. In the English context the move to centrally prescribed curricula is a recent one, having been introduced under the 1988 Education Act. Its legacy has been described by Halsey et al. 1997) in the following terms:

At the school level, the consequence of the introduction of centralised curricula is that the power of parents and communities over a key aspect of education is removed, leaving them with the technical aspects of management.<sup>70</sup>

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68. Dale, R. (1997). Educational markets and school choice. *British Journal of Sociology of Education*, 18 (3), p.455, quoted in Chubb & Moe, *Politics, markets and American schools*.

69. Dale (1997), p.455.

70. Halsey et al. (1997), p.25.

The introduction in 1993 of such concepts as, seven essential learning areas, eight groupings of essential skills, achievement levels which students pass through, and of strands and contexts of learning, came under attack in New Zealand from both ends of the political spectrum. The far right — represented by spokespersons from the Business Roundtable — were equally as critical as were the far left, although for different reasons. Arguably the most vehement opposition was expressed at the secondary school level, where some commentators have suggested that very little change had occurred in the way in which the curriculum is delivered in many, if not most, secondary schools for several decades.<sup>71</sup>

The exercise of central control through the Ministry of Education — directly to the government and its ministers of education — was further maintained through the provision of funding and resources. In turn, control was also exercised through various audit requirements and through the work of the Education Review Office. Direct control had been secured by various Education Acts and amendments that remained in force. Under each of the numerous amendments to the Education Acts during this decade, control remained firmly vested in the Ministry of Education. In particular, it was maintained with respect to school property, school structure, through regulations specifying times that schools may open and regulations governing teacher appraisal and performance processes, apart from (and in addition to) the highly centralised curriculum requirements.

At a time when schools were being encouraged to become increasingly independent and commercially driven, the legislation that governed teacher

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71. Hood, D. (1998) *Our secondary schools don't work anymore: Why and how New Zealand schools must change for the 21<sup>st</sup> century*. Auckland: Profile Books.

employment and the position of the principal became increasingly centralised. The 1990 Employment Contracts Act and the collective agreement between the government and the teacher unions and the teacher registration board<sup>72</sup> were further examples of the increased regulation of teachers' performance and conditions of employment. Each of these contracts set out professional standards and performance indicators that regulated the role of the teacher, both within his or her classroom and the school as a whole. Innovative practices concerning changes to existing school structures — such as the development of middle schools — were therefore judged according to a set of standards and indicators held in common across all levels of students and for every part of the country. The promise of responsiveness to the needs of local communities, outlined in *Tomorrow's Schools*, (and earlier in the Picot Report) was seriously threatened by these requirements.

### **Professional associations**

At the beginning of the 1990-2000 decade there existed two strong professional bodies for teachers, The New Zealand Educational Institute (NZEI) and the Post-Primary Teachers' Association (PPTA). These associations performed two functions: as unions they operated to protect the rights of teachers, negotiating changes to their employment contracts and as a professional organisation able to develop educational programmes and initiatives within New Zealand. While the power of unions were being eroded in the early-1990s owing to legislation such as the Employment Contracts Act (which made union membership voluntary and non-binding on non-members) it did not seriously weaken union membership in

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72. The setting up of the Teachers Council (2002) which replaced the Teacher Registration Board is another example of increasing central control being exerted from the late 1990s.

the educational arena. In fact, the continued strength of the PPTA had an important part to play in the significant lack of progress in the creation of middle schools during this decade.

A further concern that the research literature into central control reveals is that of the extent of government regulation and the power that remained with the professional associations for teachers and principals. During the 1990s the growth of these associations and regular conference gatherings militated against the exercise of central control and worked against the free working of the quasi-market educational environment. In particular Principals' Associations and curriculum-based associations, each with regular national meetings and often with their own in-house publications, worked to maintain close collegial ties and a unity of purpose. These factors worked against the more individualistic tendencies of some of the centralist reforms, as Wylie found in her research:

Only 21 percent of the principals described their relations with other local schools as competitive - and half of these also said their relations were also friendly, or co-operative.<sup>73</sup>

Similarly, conferencing was pursued as the best method to discuss innovations and to share knowledge. This was due, in part, to the increased mobility of participants, and the freedom to select the most appropriate method of receiving professional development on account of the devolution of funding for this directly to schools. It also developed in response to the loss of the regional education boards and the provision of and greater emphasis on professional development by the central authority. Prior to the reforms professional

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73. Wylie (1997), p.ix.

development courses were but one means of maintaining a unified implementation strategy. This had now devolved to conferences.

## THE NEW ZEALAND MIDDLE SCHOOL MOVEMENT

The establishment of middle schools during the 1990s took place against this background of the national politics of education. As has already been discussed, the outlook of the National government's Minister of Education, Lockwood Smith (November 1990 to March 1996), had a direct influence on the creation of the first three middle schools. The issues of enhanced parental choice, greater community consultation, and the development of new structures of schooling, as responses to the market-forces evident in local communities, combine to make middle school development an important case study from the 1990s. The research material gathered from the interviews of the five principals reveals three local issues in the politics of education were developed, including those of policy importation, the reaction of the high schools to middle school proposals and the impact of the 1989 Education Act on the creation of middle schools. Chapter 7 explores local educational politics in some depth through the medium of a single case study, related to the development of Sunset Junior High School, in Rotorua.

### **Policy importation**

Each of the five principals interviewed had been, at some time in their career, a member of the national executive of the intermediate principals' association. Each referred to discussions held at these meetings about the perceived merits or otherwise of middle schools and the significant influence other like-minded principals had on the development of their own thinking and subsequent action.

Not surprisingly, each of these principals found that their experience on the national executive had had a different impact on their perception of middle schools.

David Crickmer, the Principal of Bruce McLaren Intermediate referred to his time on the national executive as follows: “I heard about the information that was coming out of Rotorua [on middle schools] and [I thought] this was the last thing we needed in West Auckland.”<sup>74</sup> By comparison Alan Dennis, of Tweedsmuir Junior High School in Invercargill, remarked that “just talking about middle schools didn’t do anything.”<sup>75</sup> The Principal of Clover Park Middle School, Ann Milne, expressed a different opinion; she found these executive meetings provided an opportunity to meet other principals with similar ideas. Milne commented that “John Sutcliffe and Brian Davidson, Doug Thwaites were talking [about] middle schools,”<sup>76</sup> and she believed these discussions to be professionally worthwhile. The influence of the national executive on the development of middle schools was extended by the development of professional links to the American National Middle Schools Association (NMSA). Nevertheless, New Zealand’s intermediate association was unable to meet the criteria for affiliation with their American counterpart until a change in constitution occurred in 2000, which opened the membership of the association to anyone interested in middle school development.

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74. Crickmer (2002), p.2.

75. Dennis (2002), p.1.

76. Milne (2002), p.4.

Milne referred to the benefits of having access to the NMSA material: "I had started reading Lipsitz's work and some American NMSA's publications."<sup>77</sup> Similarly, Dennis took out a personal membership of the National Middle Schools Association in the United States when he taught at Collingwood School.<sup>78</sup> Further to this he visited the United States and set up a teacher exchange programme with Seattle's Micah Middle School.<sup>79</sup> These comments mirrored those of Doug Thwaites, Principal of Raroa Normal Intermediate School when speaking at the inaugural middle schools' seminar in 1997. Thwaites referred to the positive influence on his understanding of and advocacy for middle schools of a 1973 NMSA middle schools publication and his receipt of a Full-bright Scholarship to teach for a year in the United States of America.<sup>80</sup>

The urge to travel to the United States to view middle schools in operation was also referred to by John Crone, Principal of Berkley Normal Middle School who visited America on two occasions; first in 1978 to view junior high schools. Crone commented "I didn't like the Junior High School concept,"<sup>81</sup> and he did not visit America again until 1996 when he attended the NMSA International Conference held in Baltimore City. There Crone visited a number of middle schools. From the research outlined above it would appear that international policy importation from the American educational environment by such contacts at principal level had a major effect on the development of middle schools in New Zealand during the 1990s. These experiences appeared to provide considerable motivation for middle

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77. Milne (2002), p.5.

78. Dennis (2002), p.1.

79. Dennis (2002), p.1.

80. Thwaites, D. (1997). *The New Zealand Middle School: What it is and what it might become*. Paper presented at the Intermediate and Middle Schools Principals seminar on Middle Schooling, Wellington, N.Z.

81. Crone (2002), p.8.

schools to be adopted in New Zealand in a way that could not be provided solely by the New Zealand practitioners. In many respects this policy importation mirrors the visits to America of Thomas Wells and Frank Milner in the early-1920s, and the involvement of the American Carnegie Corporation in assisting the New Zealand government to establish the New Zealand Council for Educational Research (NZCER) in the 1930s.

Therefore, it can be seen that the policy importation that occurred during the 1990s at a national level through conferences and overseas visits were also mirrored at the local educational level in the development of individual middle schools. These two features of policy importation will be explored further in chapter 7. It seems that the adoption of education concepts and practices could occur at both the national and local level simultaneously, as Ball has suggested, although different political agendas may well be in operation.

### **Relationships between middle schools and high schools**

One of the arguments against the further expansion of middle schools that was articulated by the intermediate principals interviewed for this study was based on school authorities' anticipation of opposition from neighbouring high schools. The existence of positive relationships between intermediate schools and their local secondary schools was by no means universal — it varied from community to community — and these relationships were frequently difficult. Subsequently, the issue of whether or not high school authorities would accept middle school

philosophies was mentioned in all five interviews, and as such it became a core theme in the local educational politics associated with the creation of middle schools.<sup>82</sup> The effect of market-place economic politics at a local level depended on the degree of community support — or opposition — a move to middle school status might create.

For John Crone, the establishment of a middle school in the Hillcrest community (in Hamilton) was never intended as a threat to the local high school. As mentioned earlier, this development was seen as an opportunity to provide an educationally effective alternative to the programmes the local high school was offering in keeping with the “new” notion of parental choice. In 1990 Crone spent some time in discussion with the principal of the local high school (Hillcrest High School) and, if it had not been for the latter’s untimely and tragic death, it is possible that Berkley may have been one of the first middle schools established in New Zealand. As it was four years were to pass before this proposed institution became a reality.

Crone attempted to provide a viable alternative in type of schooling for his parental community within the context of the quasi-market model philosophy discussed earlier. Unfortunately, this was not how the local high school authorities viewed the move to middle school status under the leadership of its new principal. They immediately stopped any student who came from Berkley Middle School beyond the usual enrolment point of Year 9 enrolling in their school. This had the effect, while enrolment zones remained in place, of denying Berkley Middle

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82. The issue of PPTA opposition, particularly through the press statements of its president Martin Cooney, has been discussed in chapter 3.

School students access to a high school from the fifth form (Year 11). Crone described the significant impact the Hillcrest High School policy had on roll numbers in the senior school:

We'd got down to eleven students [in Year 9] and, it was because the students [who] had chosen to stay with us – not one could go onto the local High School. So, parents had to make a choice – if they wanted their child to go to a [high] school, then you had to go when everyone else did [i.e., at Year 9].<sup>83</sup>

In contrast, after the abolition of the zoning legislation in 1997 which had previously denied primary, intermediate and middle school students access to high schools, other than the local high school — the number of students who stayed for Year 9 quickly rose to 43. Students from this middle school were highly sought after by a range of secondary schools across the city of Hamilton, something which satisfied students and their parents that by staying at Berkley for an additional year they were not reducing their schooling options for Year 10.

The moves Crone made initially with the principal of the local high school were similar to those made by David Crickmer to his local college. The Bruce McLaren Intermediate School Board of Trustees had begun investigating the possibility of establishing a joint campus with the local high school (Waitakere College), a situation which led Crickmer to comment that:

We've even talked about forming a joint campus together, but that is just talk at the moment [2002]. Realistically [the principal] and I would very much like to see far more movement between form twos and form threes coming to this school and the form twos going to that school as the individual need arises and we might even get that going yet. We are still talking about it.<sup>84</sup>

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83. Crone (2002), p.11.

84. Crickmer (2002), pp. 4-5.

Such discussions, between intermediate schools and high schools at a local level, often occurred across New Zealand in the mid-1990s.<sup>85</sup> Many communities were keen to investigate the most effective method of improving the transition between schools at the Year 8, 9, or 10 interface, in the best interests of individual students, at this critical transition point in their school lives. Like Berkley Middle School, Clover Park Middle School also experienced considerable negative feedback from the high schools of South Auckland to their change-of-status. Unfortunately, the method used to gain middle school status in 1994 created some bitterness among the local high schools. This method involved as Milne commented:

As far as the local secondary schools were concerned, I'd deliberately gone behind their backs to get a middle school established and this was a threat to their falling rolls.<sup>86</sup>

The opposition of the South Auckland secondary schools in to this middle school has been quite intense. For example, Milne referred to the AIMHI (Achievement Initiative in Multi-Cultural High Schools) Project whose researchers — without visiting Clover Park or interviewing the staff — drew the conclusion that their middle school programmes were less effective than those offered by local high schools. In particular, much of the secondary school opposition to Clover Park Middle School was discussed through the media. Milne lamented that “some pretty nasty media articles [have appeared] in the local newspaper that have been initiated by secondary school principals, and it’s just a dirty game, and [the accusations are] completely unfounded.”<sup>87</sup>

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85. For example, the Principal of Kaitao Intermediate School in Rotorua initiated talks concerning forming a “sister-school” relationship with his local secondary school (Western Heights High School).principal.

86. Milne (2002), p.4.

87. Milne (2002), p.9.

Regardless of these initial attempts to gain support from the local high schools for some change in the status of their schools, most of the principals interviewed remained both passionate and optimistic about the need for an improvement in relationships between the intermediate schools and their local high schools. Trevor Rowse of Northcross Intermediate School, for example, was concerned that talented youth may receive little support when they move onto secondary schools:

We have in Year 8 some brilliant kids who go back to College and are almost put back to the Primer level, you know, they are idealistic, challenging and affectionate and they can identify with [their teacher], if they get the right teacher you can take them to the heights that you can't believe as a classroom teacher.<sup>88</sup>

This overriding concern about students not being adequately catered for by the secondary system was echoed in the following comment made by Crone:

I got a Progress and Achievement Test [PAT] Profile that I looked at and examined of Seventh Form [Year 13] success and Sixth Form [Year 12] success and, apart from one or two individuals, the PAT Profile five years previous hadn't changed one bit in terms of those who passed, and those who got A Bursaries and those who got B Bursaries were all representative in the proximity of my population hadn't changed.<sup>89</sup>

This perception of a lack of meaningful student progress in secondary schools, and similar perceptions of students sitting "still" academically troubled the five interviewees. A primary concern of these principals was that they could not see this secondary school "lethargy" dissipating in the near future. They considered this situation to be alarming at a time when a large number of students who were moving through the New Zealand education system were beginning to enter the secondary system, one they perceived as not being ready for adolescent boys and

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88. Rowse (2002), p.5.

89. Crone (2002), p.13.

girls, rather than these students not being ready for the secondary school environment. A common response from the interviewees was that an opportunity currently existed for students to remain in the middle school system for two or three more years until secondary schools were ready to cater for their needs, but that the Ministry of Education needed to fully appreciate this possibility.

According to Crone, the possibility existed in receptive communities for the intermediate school to “keep their entire Year 9 group and allow the high school time to accommodate the bulge [in the number of students] and not build an extra building.”<sup>90</sup> Crickmer also understood that some secondary schools were seriously considering this prospect:

There was more and more of a movement for the secondaries to give away the third and fourth forms as they are concentrating on this NCEA [National Certificate of Educational Achievement, covering years 11-13 inclusive] business. So [if] that happens you are going to get a political realisation that, yes, it might be better to let secondaries concentrate on their main task. In that case, who is going to pick up Year 9 and 10? Intermediates will put up their hands.<sup>91</sup>

The relationship between the middle schools and high schools continues to be, at best, strained. If the workload issues concerning the implementation of NCEA, the concerns over trying to accommodate large numbers of students at high school and the longer time students now spend there are given serious consideration then they could help to provide a valuable *raison d'être* for setting up middle schools in New Zealand. However, to achieve this outcome some earnest bridge building would need to occur between the primary and secondary sectors. A variety of differing scenarios would be available to communities that entered into

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90. Crone (2002), p.13.

91. Crickmer (2002), p.6.

meaningful dialogue. For example, Crickmer alluded to the possibility, in areas of rapid demographic decline, of two schools sharing a single school site. This had formed part of his discussions with his local high school. If this is one of the permissible outcomes of the ministerial review of secondary education which was instituted in 2003 then extensive consultation with intermediate schools would need to occur.

### **The legacy of the 1989 Education Act**

Secondary school resistance to the development of middle schools was also evident in another arena according to the interviewees. Milne suggested that the opposition that Ministry of Education officials had expressed to the middle school movement, in Auckland at least, was due in part to the “secondary school anti-brigade that exists in large numbers in the Ministry as well as out there in the schools themselves.”<sup>92</sup> While the Education Review Office (ERO) had supported the movement to middle school status at Clover Park, the Ministry of Education (MOE) had been less flattering. The basic “problem” that Clover Park suffered from, in the Ministry’s assessment, was its use of vertical age-grouping (instead of single year banding) and its emphasis on making provision for the students’ different cultural backgrounds.<sup>93</sup> Yet the school had received strong support from parents and the community for these practices. It is noteworthy that the Ministry’s conclusion was not supported by numerous ERO visits or the findings of Dr. Russell Bishop, a University of Waikato researcher into Māori student achievement. If *Tomorrow’s Schools* had provided a politically endorsed blueprint for community empowerment and “ownership” of education, then the Ministry of

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92. Milne (2002), p.7.

93. Milne (2002), p.7.

Education officials in the Auckland office must have interpreted this differently in the case of Clover Park.

Both Crone and Milne were conscious that the legislative foundation of middle schools rested on their definition as a restricted composite school under the Education Act. Consequently, only a slight change in this legislation could see the dissolution of the existing middle schools overnight. In addition, other legislation directly impinged on the viability of middle schools. As outlined earlier, a change in the zoning legislation, for example, had already made a significant difference to the size and viability of Berkley's Year 9 classes. This perceived lack of strong legislative support for central government was of concern to both middle school principals. Of equal importance, however, is the fact that this zoning legislation had worked against the educational model that had been developing in West Auckland, one that had involved establishing closer ties between the local schools. Crickmer captured this reality when he remarked that "before Lockwood Smith came out and said all zoning [was] abolished, we were looking at ways of extending our bright kids and helping the slow kids and [encouraging] a little bit of movement between schools."<sup>94</sup> With the end of school zoning in 1996 there was greater competition between schools in West Auckland to attract and retain students. Not surprisingly, this political decision militated against middle school development in that community at least.

All five interviewees mentioned the influence that the *Tomorrow's Schools* policies had had on the way they viewed middle schools. Three of the five saw that this policy shift, during the late-1980s and early-1990s, provided an ideal

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94. Crickmer (2002), p.5.

opportunity to establish middle schools. Fortunately for them, two of their subsequent proposals were successful. Two of the interviewees mentioned the direct involvement of the then Minister of Education, Dr. Lockwood Smith<sup>95</sup>, in approving their application to become a middle school. In particular they emphasised the importance of obtaining the minister's signature on the relevant documents, a significant change that had been introduced with the 1989 Education Act. The direct involvement and support of the minister, (as discussed further in chapter 7 with particular reference to Sunset Junior High School), was a key political factor in the evolution of middle schools in New Zealand during this decade.

It is also important to reiterate the influence of the two educational unions, The NZEI and the PPTA, upon the way in which middle schools developed. The pay parity legislation<sup>96</sup> of the 1990s settled many of the long standing site differences that existed between the two unions whenever they co-existed within the one school. However, Crone was firmly convinced that the teacher unions did not necessarily operate in the best interests of school students. To this end he stated: “We have unions that stand in the road of it [middle school development] – definitely unions don’t stand for children, they stand for workers and it’s a shame, because education stands for children.”<sup>97</sup>

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95. John Crone (2002, p.3) stated that “The political environment encouraged me to do so under National, especially under Creech but perhaps under Lockwood too.” Ann Milne (2002, p.4) remarked that “In July I received Lockwood Smith’s letter that said “Your change of class has been approved.””

96. Pay parity legislation brought the pay scales of primary teachers into line with secondary teachers. Teachers with the same qualifications and experience were to be paid the same salary irrespective of the age of the students they taught.

97. Crone (2002), p.12.

But there were factors beside union support or involvement to consider in the evolution of middle schools. Milne, for instance, commented on the influence other intermediate schools had had on Clover Park's development as a middle school. While most of the intermediate schools in South Auckland had expressed an interest in middle school structures — or endorsed the attached unit idea first trialled at Clover Park — a number of intermediate school-aged students continued to leave the area. Of concern to Milne was the fact that these students left to attend intermediate schools outside South Auckland. Milne stated that “there are intermediate schools in an affluent area of Auckland; a large number of the kids come from here [South Auckland] and are bussed to those schools.”<sup>98</sup> The pressure from other intermediate schools to attract more students, albeit outside the immediate geographical area, was a very real problem because of the perceived promotional damage this was seen to inflict on the middle school model. While most of the parents involved in bussing their children outside of the area were doing this for a complex set of reasons — many of which had to do with “white” and “brown” flight — it nonetheless reflected poorly on the development of a middle school ethos in South Auckland, Milne concluded. The pressures applied by the secondary schools, the Ministry of Education, unions and other intermediate schools, as a direct result of the implementation of the 1989 Education Act, thus need careful consideration in any attempt to extend the middle school movement within the present New Zealand educational environment, and in my examination of this movement.

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98. Milne (2002), p.7.

## CONCLUSION

This chapter has analysed the political nature of the New Zealand educational scene with particular emphasis on the effect of the introduction of national policies on schools alongside those more immediate practices and procedures associated with local educational politics. This latter aspect is developed in greater depth in the study of middle school development at one prominent institution, Sunset Junior High School in the following chapter.

On account of the reforms of the late-1980s and early-1990s a strong New Right influence was introduced at the national level and it heavily influenced the type of decisions made about schools throughout the 1990s. The related neo-liberal theories of personal choice and market freedom underpinned the recommendations contained in three key education documents of this period, *The Treasury's Government Management* (1987), *The Picot Report* (1988) and the *Tomorrow's Schools* blueprint of 1988. This chapter has outlined several issues relating to globalization, and has described the degree to which the New Zealand reforms could be (and has been) interpreted by analysts as having been imported from elsewhere. Furthermore, the conclusion drawn has been that what evolved here would appear to have been indigenous to and part of the New Zealand experiment. This “experiment” suggests that policymakers have sought to apply the ideas of the New Right more zealously in New Zealand than may have been the case in other countries.<sup>99</sup>

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99. Kelsey, J. (1997). *The New Zealand experiment*. (2<sup>nd</sup>.ed.) Auckland: Auckland University Press.

Three major neo-liberal trends have been analysed to some extent. Those of personal choice, market freedom, and central control have been critiqued from the viewpoint of a number of theorists and researchers in the field of educational policy studies. All three strands were evident in all aspects of educational practice and policy, during the 1990s, which indicates a high degree of politicization of education. However, these theories do not of course sit in a vacuum; they must be applied to and tested against a specific proposal at a certain period in time. The intention of this research has been to use the study of the creation and development of middle schools as a special case study, alongside interview material to ascertain the extent to which the issues and trends examined in the present chapter helped to shape the adoption of an alternative school structure.

From this research it appears that the reforms to the administration of education in the late-1980s and early-1990s created a political climate that was conducive to the development of a new structure of schooling, that of the middle school. Each of the principals interviewed referred to various aspects of these educational reforms — school zoning, creation of boards of trustees, primary school recapitation, or the political involvement of the minister of education — as representing and adding to the politicization of local educational decision making. Furthermore, in the development of middle schools in certain communities political influences such as policy importation (see chapter 4) or the effect of globalisation on the introduction of new school structures (see chapter 6) were also aspects of the effect of the politics of education, as they had been at the national level. When individual middle schools were being contemplated (and later established), it is clear that local educational politics intersected and clashed

with wider, national policies. Such conflicts could and should have been predicted on account of the emphasis on greater parental and community input into local schooling matters, as prompted by the recommendations made in the Picot Report. Moreover, central government and its agencies (e.g. ERO, the MOE, etc) were intended to exercise a monitoring and auditing role consistent with national education legislation. Therefore, the views of these officials are important in the debate over the “best” direction for school development in and beyond New Zealand communities.

Following this general overview of the educational politics of the 1980s and 1990s and their influence on the development of middle schools as a “new” type of school structure in New Zealand, I then relate these policies to the creation and development of one middle school, that of Sunset Junior High School, in Rotorua. This school has been chosen because it provides a valuable insight into the interplay that exists between pedagogical concerns for the schooling of emerging adolescents and the political tensions of the 1990s. Furthermore, these pedagogical concerns and political tensions were reported at length in the local and national press, hence providing a wealth of contrasting and conflicting research data from which to draw relevant conclusions.

## **Chapter Seven**

### **Rotorua City: A Case Study**

#### **INTRODUCTION**

The development of middle schools within Rotorua city — between the years 1996 and 1999 — provides an opportunity for a detailed case study through which the interplay between pedagogy and politics, as aspects of educational change, can be analyzed. Prior to 1996 the concept of middle schools, as an educational structure, was one that interested a number of educationists within the city, but was not a physical reality. Yet by 1999 two private organizations had attempted to set up a middle school in the city; one state intermediate school had become a Junior High School and a second had had its application for a change-of-class to become a middle school declined. In addition, a ministerial working party had been established to review schooling structures and educational provisions within the city. Two high schools had applied for a change of class to establish Form 1 to 7 institutions, both of which were also declined. A Kura Kuapapa Māori had changed class from a full primary to a composite school including Form 3 to 7 students.

The pedagogical issues surrounding the best school structures to meet the needs of emerging adolescents was publicly debated and widely reported in the local press. Not surprisingly, the political views of vested interest groups and key personnel also emerged and were reported in the local press over this four-year time frame. The following chapter, therefore, provides a case study of the various educational events and debates that occurred. This includes a detailed analysis of a number of

key issues that arose within the wider national debate over pedagogy or politics ‘leading change’ in an educational setting. This case study provides pertinent and abundant evidence of the interplay between politics (as covered in chapter 6) and pedagogy (as covered in chapter 5) especially centred on such issues as; policy importation, choice politics, school structure debate and the political will of key personnel, as they occurred in one local setting.

As has already been discussed, middle school development in the New Zealand context has been typified by an intense interplay between political and pedagogical pressures. A number of these pressures have been outlined from the perspective of research literature and the interviews of five principals who have been involved with these developments. This chapter sets out then to investigate the question; what balance was achieved between the political and pedagogical pressures in the development of middle schools in Rotorua City? From the evidence provided the conclusion reached is that while pedagogical issues may be among the most vocally argued; in reality the political aspects tend to be the determining factors of educational change. Regardless of the educational merits of middle schools for the city of Rotorua, in reality the potential for conflict between schools lead to the decision to limit middle schooling opportunities to one Junior High School. Politics in this case study took precedence over pedagogy.

## CASE STUDY DATA

The use of case studies as a research technique provides “a unique example of real people in real situations, enabling readers to understand ideas more clearly than simply by presenting them with abstract theories or principles.”<sup>1</sup> However, “because case studies provide fine grain detail they can also be used to complement other, more coarsely grained — often large scale — kinds of research.”<sup>2</sup> In this, then, case studies provide “powerful human-scale data on macro-political decision-making, fusing [both] theory and practice.”<sup>3</sup> Chapter 6 outlined a number of the macro-political issues relating to political influences on the national development of middle schools. This chapter outlines in the micro-environment of a single case study the interplay at a local level of the tensions that existed between politics and pedagogy.

The case study of Rotorua city was selected for two reasons. First, the development of Sunset Junior High as one of the first eight middle schools provided a significant case study for the analysis of the interplay between politics and pedagogy. This development was an example of a critical case study “[one] that can make a point quite dramatically or are, for some reason, particularly important in the scheme of things.”<sup>4</sup>

Second, the researcher in this case study was able to readily access material on this study from; interviews of key participants, primary documents and newspaper clippings over an extended period of time and was, himself, a participant in the developments outlined in this case study. As Patton suggested when the collection

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1. Cohen, et al. (2000), p.181.

2. Cohen, et al. (2000), p. 182.

3. Cohen et al. (2000), p. 183.

4.Patton, M.Q. (1990). *Qualitative evaluation and research methods*. Newbury Park: Sage Publications, p.174.

of research material by the evaluator is limited — due to time and access issues — then “it makes strategic sense to pick the site that would yield the most information and have the greatest impact in the development of knowledge.”<sup>5</sup>

The parameters of this case study therefore, include the following considerations. This case study provided the researcher with a rich and varied supply of research material. Much of this material was collected chronologically, beginning in 1996 through to the present, particularly material available through the local press.<sup>6</sup> The focus was maintained on the single case study of Rotorua city and the attempt by two intermediate schools to achieve middle school status with varying results. The researcher was integrally involved in the development of one of these two schools.<sup>7</sup> Such temporal and geographical boundaries provided opportunity for the specific characteristics of the case study to be investigated and the resulting case study provides a blend of description and analysis.<sup>8</sup>

Various commentators have created a range of typographies of case studies. The research methodology of this case study is consistent with those outlined by; Merriam (1988), of an ‘interpretative case study’ which develops conceptual categories inductively in order to examine initial assumptions; Yin (1994), of an ‘explanatory case study’, one which tests theories; Stake (1994), of an ‘instrumental case study’ examining a particular case in order to gain insight into

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5. Patton (1990), p. 174.

6. In particular the daily newspapers *The Daily Post* and *The New Zealand Herald*; the weekly newspaper *The Rotorua Review* and the monthly magazine *Scene: Rotorua*.

7. As Deputy Principal of Kaitao Intermediate School (1993-1999) then as Principal of Mokoia Intermediate School (2000- to present).

8. Parameters and hallmarks of a case study as outlined by Cohen, et al. (2000), p. 182.

an issue or theory;<sup>9</sup> and of Burns (2000), of a ‘situational case study’ where a range of research material is pulled together to provide “a depth [of understanding] that can contribute significantly to the understanding of the event.”<sup>10</sup>

The advantages of undertaking a case study are that, while they tend to be strong in reality and allow for generalisations, they also provide an opportunity to archive descriptive material and can be undertaken by a single researcher. However, the disadvantages of this methodology include the fact that they can be prone to observer bias and are not easy to cross-check, hence the criticism of case studies as being selective, biased, personal and subjective. As Burns stated:

It is essential to remember that documents may not be accurate or lack bias, and that they have been written with a specific audience in mind, for a specific purpose. In fact many are deliberately edited before issue.<sup>11</sup>

This caveat is particularly important when considering that a good deal of the resource material referred to in this case study is based on press clippings. The purpose of this case study then, is to provide the researcher with an opportunity to “probe deeply and to analyse intensively the multifarious phenomena that constitute the lifecycle,”<sup>12</sup> of middle school development in Rotorua with a view to establishing generalisations about the wider population to which this middle school forms a single case study.

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9. Cohen, et al. (2000), p. 183.

10. Burns, R.B. (2000). *Introduction to research methods*. (4<sup>th</sup>. edition). Frenchs Forest, NSW: Pearson Education, p.467.

11. Burns (2000), p. 467.

12 Cohen, et al. (2000), p. 185.

## ROTORUA CITY: A DESCRIPTION

Rotorua is a tourist city of approximately 60,000 citizens situated in the Bay of Plenty, central North Island of New Zealand. The population consists of ethnically indigenous Māori and Pakeha, in almost equal proportions. Māori are mostly of Te Arawa descent and historically have strongly supported education within their tribal area. In 1996 the city was served by 43 schools; including four intermediate schools, four secondary schools and one integrated catholic secondary school that enrolled students from Form 1 to 7. No private school catering for this age-group existed within the city. Two main tertiary providers served the city; the local polytechnic and after 1998 a new Māori institution, Te Wānanga o Aotearoa.

In 1996 Sunset Intermediate School (SIS) appointed a new principal, Turi Ngatai, who came from a principal position in Whakatane. The school had been poorly managed for a number of years prior to this appointment,<sup>13</sup> and for a variety of reasons faced a falling roll situation and impending closure. Ngatai's appointment came at much the same time as the signing of the agreement that established the first National-New Zealand First coalition government. Part of that coalition agreement referred to the establishment of middle schools in New Zealand and the active removal of barriers to the setting up of such schools.<sup>14</sup>

The concept of middle schools — as Form 1-4 institutions — was not new to Rotorua. Graeme Ennor, a private businessman, had been attempting to set up a

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13. Education Review Office (1995). *Discretionary review of Sunset Intermediate School*. Rotorua: ERO.

14. Peters, W. (1996, December 5). Key initiatives of policy: Coalition Statement 3. Policy: Education.

private middle school in the city for a number of years. By December 1996, Ennor had been unable to find an appropriate site for this school that he referred to as a “Challenge Academy”.<sup>15</sup> Little more was heard of this initiative after December 1996, although another similar initiative was reported in the local press at the beginning of 2000, without naming the key participants.<sup>16</sup>

### **Rotorua's first middle school**

Late in 1996 Ngatai announced the intention of Sunset Intermediate School to pursue the process of becoming a middle school. Initially the intention was to trial a specialist teaching programme, during 1997, similar to that of an American junior high school. If approval was granted, the board would then move to change the status of the school to a junior high school in 1998. Although a degree of interest in such a proposal already existed in the city — the vice-president of the New Zealand Intermediate Schools Association and local Rotorua Principal, Don Crossman — felt confident that “Sunset Intermediate is likely to be the only Rotorua school to seriously consider adopting the middle school concept, for now anyway.”<sup>17</sup>

Sunset Intermediate School Board of Trustees held its first public meeting to discuss the issue of establishing a middle school in March 1997. Ross Lamb, principal of Southern Cross Middle School in South Auckland, was invited to speak to the meeting. By the end of March a second Rotorua intermediate school also indicated their intention to investigate a similar change of status. Rory

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15. Caspari, A. (1996, December 14). Private school plan on hold. *Daily Post*, p.3.

16. Fraser, T. (2000, February 2). Schooling venture progress slow. *Daily Post*, p.2.

17. Crossman, D. (1996, December 30). Spare a thought for middle schools. *Rotorua Review*, p.4.

O'Rourke, principal of Kaitao Intermediate School, commented on this decision to move towards middle school status as being based on:

middle schooling support expressed by some parents, visits to Western Heights High School over the possible new direction and a board of trustees' decision to send a staff member to a middle school conference in the United States last year.<sup>18</sup>

In November 1996 Kaitao Intermediate had sent its deputy principal, this researcher, to the National Association of Middle Schools conference in Baltimore, USA, with two other New Zealand principals.<sup>19</sup> The idea of pursuing middle school status had been part of the Kaitao Intermediate School's Board of Trustees' agenda since 1993, although little in a practical way had been undertaken until this conference in late 1996. The appointment of this researcher, from a Form 1 to 7 secondary school, to the position of deputy principal in 1993 had been a deliberate move by the board of trustees to prepare their school for middle school status. These two intermediates – Sunset and Kaitao - shared two contributing primary schools, and in past years had had bordering enrolment scheme areas. While Sunset's roll had declined in recent years that of Kaitao had remained stable, although both schools were situated in areas of established housing with little new housing development.

In November 1997 Sunset Intermediate was granted approval, by the Minister of Education, Wyatt Creech, to change its status. The Hamilton office of the Ministry of Education had been opposed to this request being granted, however, as the ministry officials commented that in their opinion Sunset would be unable

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18. O'Rourke, R. (1997, March 20). Kaitao Considering Change, *The Daily Post*, p.3.

19. One of these two principals, John Crone, returned to establish Berkley Middle School in Hamilton. The Berkley application to become a middle school was granted at the same time as that of Sunset Junior High.

to deliver the secondary school curriculum.<sup>20</sup> Moreover, the Hamilton ministry officials claimed that Sunset's predictions of roll growth to 450 by the year 2000 was unsubstantiated.<sup>21</sup> In the same month (November, 1997) Kaitao Intermediate Board announced that it was to begin its consultation process, looking toward securing a middle school status for 1999.

Kaitao's announcement was quickly followed by Rotorua Boys' High School (RBHS) declaration that they would seek to become a Form 1 to 7 secondary school. This announcement was made in February 1998, and was followed by Western Heights High School (WHHS) making their Form 1 to 7 announcement one month later. The RBHS announcement came after discussion among its board of trustees and parent community. While this proposal had less than unanimous support — the board vote consisted of three in favour, two opposed and two abstentions, including the staff representative's vote<sup>22</sup> — it did indicate that a degree of consultation had occurred with its parent community and signalled its intention to return to a status the school had had prior to 1958. The announcement of WHHS, by contrast, however, indicated more of a domino reaction to that of RBHS. This announcement was prefaced by remarks made by the principal, Byron Bentley, to the effect that:

Unless it can be proved by a Ministry of Education investigation that failing schools should have some or much of their role and roll taken over by other schools — and in our opinion they will not find any schools in Rotorua in that category — the status quo should remain.”<sup>23</sup>

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20. Editor. (1997, December 10). Creech veers into the middle. *Education Review*, p.1

21. Editor. (1997, December 10). Creech veers into the middle. *Education Review*, p.1

22. Editor. (1998, March 26). Board split on new status. *The Daily Post*, p.1.

23. Shelton, A. (1998, March 13). Principal sees chaos for schools. *The Daily Post*, p.1.

Furthermore, in March 1998, Ngongotaha Primary principal — Terry Morrison — indicated that he would seek recapitation for his school, to become a Full primary school. Ngongotaha Primary was to be one of the first primary schools in Rotorua to undergo a rapid decline in school population numbers due to the lack of school-age children in the community, predicted by the Ministry of Education's demographic projections for the city.<sup>24</sup> Ngongotaha Primary School was a contributing school to Kaitao Intermediate School. In fact Morrison never pursued this course of action, but this announcement added to what rapidly became a confusing local educational environment.

In an attempt to seek a way through what was also becoming an increasingly public debate in the local press, the Rotorua Principals' Association called on the Mayor, Grahame Hall, to chair an educational forum during late March. The outcome of this forum was a motion carried by those present that "the Rotorua Principals' Association wants to put a one year delay on any city school applying for a change of class so an impact study can be done."<sup>25</sup> However, the association did not have the authority to enforce such a resolution and the pursuit of changes-of-class continued. This and other similar recommendations did, however, find their way both to the Hamilton Ministry of Education office and to the Minister of Education himself.<sup>26</sup>

In April 1998, Sunset Junior High School was officially opened. The middle school model chosen for this school was similar to that found in many of the

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24. APR Consultants. (1998, June) *Demand and supply projections for Rotorua District schools: 1998- 2010*. Rotorua: Author.

25. Shelton, A. (1998, March 27).Principals Request change delay. *The Daily Post*, p.3

26. During 1998 the Board of Rotorua Boys High School met with the minister of education in Wellington while the Board of WHHS was denied a similar opportunity.

North American Junior High Schools with specialised teaching being conducted by mixed subject specialists. By May 1998 only three further changes-of-class applications had been received by the Ministry of Education; Kaitao Intermediate School, Rotorua Boys' High School and Te Kura Kaupapa o Te Koutu. This last application was for a change from a full primary status to that of a composite school, allowing for the enrolment of secondary-aged pupils. In May the Ministry of Education sent out forms requesting consultation from all the schools that could be affected by one or more of these applications. This consultation process involved a significant number of schools within the city.

### **The ministerial working party**

Wyatt Creech's decision — following this period of ministry consultation — when it was released in October 1998, heeded the advice of the Rotorua Principals' Association:

I have decided to defer determining the issue for a year and set in place a Working Party to consider the broader issue of the future structure of education provision in Rotorua.<sup>27</sup>

Having deferred the decision — allegedly to gain a wider view of primary and secondary education across the city — the minister, Wyatt Creech, went on to say that, however, approval of the change of status for Te Kura Kaupapa o Koutu had been granted. No reason was given in the letter for this decision. While Creech envisaged that the working party would be able to give independent advice on the best arrangements for intermediate and secondary schooling in Rotorua, it appears that this did not include that of the Kura, which drew directly on the school populations of Kaitao, WHHS and RBHS. The Principal of the Kura, Unueku

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27. Creech, W. (1998, October 7). Letter to Kaitao Intermediate School Board of Trustees.

Fairhall, had been the head of the bilingual department of WHHS prior to setting up this Kura. Originally the Kura had been established as a small school — of no more than 50 students — as a full primary to cater for the needs of full immersion Māori students. While this had had an initial impact on the bilingual unit at Kaitao Intermediate, it had not had a great influence on that part of the city while students then had to move onto high school. Few parents enrolled Year 7 and 8 students at the Kura for they wanted them to experience a large school such as Kaitao Intermediate before entering high school.<sup>28</sup> However, this application permitted the Kura to enrol high school students, making it increasingly attractive to Māori parents, as it was able to cater for the entire school years of their children.

During October 1998 comments in the local newspapers added to the controversy surrounding middle school development. For example, the possible use of a loophole in the Education Act that allowed one school to set up an attached unit in another (as had been enacted at Clover Park School) received a good deal of press attention. If pursued, this would have enabled Kaitao Intermediate to find a middle school elsewhere in New Zealand that would agree to set up an attached unit, thus allowing the school to cater for Year 9 and 10 students. This drew much heated comment, such as the following from the Rotorua Principals' Association:

To circumvent the Minister's decision would in the opinion of the [Rotorua Principals'] Association, be offensive to his role as the Educational Leader of the Nation.<sup>29</sup>

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28. O'Rourke, R. (1998, June). Letter sent to MOE Hamilton in response to the consultation regarding change-of-class.

29. McTamney, J. and Crossman, D. (1998). "Joint Press Statement" as President of the Rotorua Principals' Association and National vice president of the NZIMSA respectively. This statement was not published but was widely distributed in Rotorua.

In the same month WHHS announced the setting up of an Institute of Studies as a new initiative for non-academic students who tended to drift away from school late in their fourth form and into their fifth form year. This proposal was hailed by Tau Henare, Minister of Māori Affairs, as a means to meet local needs with local solutions, though it would be heavily funded from the national coffers. The development of an alternative programme for senior secondary students at the same time as the college was opposed to the development of a middle school in their largest contributing intermediate school is noteworthy. The growth of intermediate school rolls by change of class was a frequent argument stated by secondary principals in the local press.<sup>30</sup> Yet at the same time WHHS sought to increase its roll at the senior end of the school while denying this to its largest contributing intermediate school.

During December 1998 the Ministerial Working Party members were announced. The party was to be chaired by Judy Keaney (QSM) who also held the position of chair of the Education sub-committee for the Rotorua Energy Charitable Trust (RECT). The other two members were Graham Searancke, a tax consultant and accountant, and Peter Ramsay, Professor of Education at the University of Waikato. The brief for the working party included the intention:

To compile its information on parental choice, the quality of education provided, [the] achievement levels of all students, and [a] demographic analysis of the Rotorua District.<sup>31</sup>

A change in the Minister of Education with the appointment of Dr. Nick Smith led to the working party's report being published under his name. The report was

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30. Shelton, A. (1999, March 13) Principal sees chaos for schools. *The Daily Post*, p.1. as one example of this.

31. Shelton, A. (1998, December 8). Schooling views to be sought. *The Daily Post*, p.3.

delivered in July 1999, and consisted of two recommendations; the first declining all applications for changes-of-class and the second setting up new cluster initiatives based on local high schools across the city. The first recommendation was for a five-year moratorium to be placed on all school structural change in Rotorua so that a planned process of change could be developed. The working party's second recommendation was that educational initiatives be established to develop co-operative, innovative practices across clusters of schools.<sup>32</sup> The working party emphasised the fact that little research existed that indicated that one structure of schooling was of greater benefit than any other, while also agreeing that one structure may indeed provide greater educational benefit. In the working party's opinion this could not be investigated currently as there were insufficient opportunities to trial and research innovative structural practices that could provide this evidence.

Following this decision of the Minister, most schools in Rotorua opted to join one of the cluster groups suggested in the working party report. While the report did not explore the reasons behind setting up of clusters of schools there had been submissions made to the working party from at least one very successful cluster on the Eastside of the city suggesting that by clustering and encouraging schools to work together the issues surrounding competition for students may be allayed.<sup>33</sup> These clusters were to be established early in the Year 2000. The report suggested

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32. Keaney, J., Ramsey, P., Searancke, G. (1999). *Report of the Rotorua school structures ministerial working party*. Rotorua.

33. Crossman, D. (1999, March 3). Submission from Mokoia Intermediate School to the ministerial working party.

that they consist of a facilitator and a research officer for each of the three clusters.<sup>34</sup>

In September 1999 however, the board of Kaitao Intermediate publicly announced a change in their school's name to Kaitao Middle School, explaining that the school now pursued a middle school philosophy in its structure and curriculum more closely than an intermediate school philosophy. Schools within New Zealand can call themselves by any name they wish, although that name might not be recognised by the Ministry of Education. The board of trustees in undertaking this name change signalled to the Rotorua community that it still passionately believed in the middle school philosophy and that the fact that they were not enrolling Year 9 students was out of respect for the Minister's decision rather than because they agreed with it. This argument was not accepted by the Ministry of Education,<sup>35</sup> which continued to address the school by its previous name.

In December 1999, a further attempt was made to introduce a private middle school concept. A group of Rotorua business people stated that they had land for a school site at Kaharoa, outside of Rotorua, and were seeking enrolments for middle school aged students. After the closing date however, insufficient enrolments had been received, and further developments were deferred to July 2000.<sup>36</sup> Since 2000 little further press discussion occurred on the development of new school structures in the city. In 2002 Sunset Junior High School discussed the possibility of joining Sunset Primary School but this amalgamation did not

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34. Keaney et al. (1999), p.12.

35. Colby, H. (1999, November 4) Letter addressed to Chairperson BOT Kaitao Intermediate School.

36. Fraser (2000, February 2), p.2.

occur.<sup>37</sup> The developments surrounding the establishment of Sunset Junior High and then the subsequent decline of Kaitao Intermediate's application create an important case study for the investigation of the interplay between politics and pedagogy as they pertain to the development of middle schools within New Zealand.

## PRAGMATIC ISSUES

This case study of schooling in Rotorua City highlighted the fact that a number of key practical issues that had up to this point acted as barriers to the establishment of middle schools were resolved at governmental level. The first of these was the issue of deferential pay scales between primary and secondary school teachers. From 1995 there had been, within the city, a steady drift of qualified and experienced primary teachers from the local intermediates to the secondary schools. These teachers were attracted by a better salary scale and what were perceived to be improved conditions of work, such as timetabled periods of non-contact with students. As the Deputy Principal of Sunset Intermediate, Heath Sawyer commented in defence of their move to a middle school status “[it would] stop a nationwide drift of intermediate teachers into high schools.”<sup>38</sup>

The first middle schools (as with intermediate schools) had both primary and secondary teachers working on the same site while maintaining different conditions of salaries and work. However, unlike intermediate schools the first middle schools also encountered a number of difficulties because of this differential that lead to inequities in salaries for responsibilities. For example, it

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37. Caspari, A. (2002, March 16) Sunset pondering a merger. *The Daily Post*, p.1.

38. Sawyer, H. (1996, December 3) Sunset sets the scene. *Rotorua Review*, p.4.

was possible to have a primary deputy principal responsible for the new senior school being paid less than a specialist secondary teacher in the same school. This became a pay parity issue that was debated at national level. By 1998 the pay parity issue had been resolved by the two respective teacher unions and the government agreeing to introduce a single unified pay scale.

However, in late 1996 the difficulty in staffing intermediate schools with degree staff in Rotorua had become a significant issue that affected all of the intermediate schools. The movement to a middle school structure was seen by some commentators as a pragmatic means of overcoming this staffing issue. Teaching staff with degrees who were considering moving to a secondary school would be able to be reclassified within the middle school and to be paid at the secondary rate, while maintaining contact with the younger, traditionally intermediate-aged students. As 1997 progressed and significant changes were signposted by both unions in the unified pay talks it did, however, have a limited life as an issue. As Don Crossman, Principal of Mokoia Intermediate, President of the New Zealand Intermediate and Middle Schools Association (NZIMSA), and member of the working party on unified pay scales commented:

The Unified Pay System and Integrated Teaching Service being introduced in February 1998 would solve any problems about employment of secondary specialists if the school wanted to do that.<sup>39</sup>

The second practical issue centred on fluctuations in the total number of school-age children living within Rotorua. As a city it is geographically contained within a series of hilly ranges. The city had, since the early 1990s, only two major employers; tourism and forestry. The city is the tribal home of the Te Arawa

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39. Shelton, A. (1997, March 4). Middle School Concept Sound. *The Daily Post*, p.2.

people and few, if any, other Māori tribal groups have settled here. Between 1995 and 1998 the city suffered a significant decline in the number of tourists from the Asian continent and a marked decline in forestry employment due to international factors. Many families left for Australia in the hope of finding better employment opportunities but returned in 2000, with improved employment conditions in Rotorua. However, the population demographics for the city maintained a steady increase in population throughout the 1990s and into the early-2000s.<sup>40</sup> With highly predictable population demographics, trends in schooling could be predicted and then matched to reality as time passed. As with national trends the demographics of intermediate-age students showed a steady increase through the 1990s and into the following decade.

It is within this context — of steadily rising intermediate school populations — that Chris Grinter, Principal of RBHS stated:

The middle school debate has basically been generated by intermediate schools in an attempt to bolster falling rolls, but might not be in the best interests of the pupils.<sup>41</sup>

The second part of this statement will be addressed in greater depth later in an analysis of the debate over pedagogy as it pertains to this case study. The first part of this statement, however, is open to interpretation. As the population demographics predicted a significant growth in the number of intermediate-aged students was due to occur throughout the period of this case study and into the foreseeable future in Rotorua. Only one intermediate school faced a falling roll

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40. APR Consultants (1998), pp.73-79.

41. Shelton, A. (1997, February 27) High school head doubts feasibility of middle school. *The Daily Post*, p.2.

situation during the period reviewed in this case study, that of Sunset Intermediate School.

It was the case, however, that Sunset Intermediate had experienced a falling roll situation due to the management of the school, not because of a lack of pupils in their traditional catchment area. This management issue was addressed by the resignation of the then principal and appointment of Turi Ngatai in 1996. With the establishment of junior high status attempts were made to reverse the falling roll trend at each age level in the school.

Furthermore, secondary schools in the city faced increased rolls earlier than predicted due to the decline of employment opportunities in the city. Such factors as; senior students remaining at school because of the depressed state of the workforce, the raising of the school leaving age to 16 years in 1995, and the introduction of tertiary provider initiatives at secondary schools (such as WHHS) had created earlier than predicted roll growth in local secondary schools. The suggestion of falling rolls — fuelled as they were by Ministry of Education figures for the middle of the 2000 decade — then some ten years hence however, was picked up readily by the local press. A local monthly magazine, *Scene: Rotorua*, summarised the middle school debate on this roll situation in its June 1998 issue thus “there is no increase in the number of students to fill these schools [those seeking change of status] we are merely moving them around.”<sup>42</sup>

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42. Drake, S. (1998). War for our children. *Scene: Rotorua Magazine*. June/July, p.44-45.

Such inaccuracies reported under emotional headings such as, “War for our children”, added nothing useful to the practical issues surrounding this debate. That the number of school-aged students within the city were limited is true, but that the change-of-class of a number of schools would affect school rolls significantly was not. All of these schools were predicted to have rising rolls well into the 2000 decade.

This issue of roll numbers (and the subsequent misinformation campaign in the local press) raised a third practical issue during the middle school debate. The practical outcome of two intermediates in one city becoming middle schools would have had an impact on the third form intakes for three of the five secondary schools in the city. Rotorua Lakes High School (RLHS), because of its geographical placement, and John Paul College (JPC) because of its special character, would not have been affected. However, two of the three affected secondary schools were at the same time actively involved in developing programmes to hold onto students who traditionally either left in the fifth form to employment or left in the seventh form to tertiary education. The creation of a so called “Form 8” assisted these two secondary schools to maintain roll numbers among this older cohort.

As one commentator stated:

It is interesting to note that polytechnics and universities are encouraging high schools to offer their courses but that secondary schools do not appear to be willing to work in a similar partnership with middle schools.<sup>43</sup>

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43. Hinchco, B. (1997, March 11). Letter to the Editor. *The Daily Post*, p.4.

Aside from these pragmatic issues of deferential pay scales and roll numbers a number of further educational issues developed as the Rotorua community debated the possibility of creating middle schools. One of the key issues to arise from the very beginning, and remained constant throughout the period of this case study, was that of school structure.

## SCHOOL STRUCTURE

The issue of the development of senior secondary schools to supplement middle schools was one school structure issue raised early on in the local press. Sandra Drake commented:

Form 5 to 7 high schools would come about if the middle school concept was very successful. They would be ‘follow on’ schools gearing the children towards examinations and work skills.<sup>44</sup>

However, such a concept was not pursued by any of the Rotorua secondary schools. The three secondary schools likely to be affected by the development of middle schools did not see the addition of tertiary courses as implying a restructuring of those schools into senior secondary schools following on from new successful middle schools. The response of both RBHS and WHHS was to respond reactively to the debate over middle schooling. That is, each publicly pursued the idea of enrolling Form 1 and 2 students rather than to consider the possibility of creating new structures within the city of middle and senior schools.

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44. Drake, S. (1998), pp.44-45.

Aside from the practical issues raised already from the very beginning of the Sunset move to change its status, the issue of which school structure best suited the learning needs of children was debated. Almost all of the protagonists in this very vocal and public debate at some time had something to say on the issue of school structure. This issue centred — as the working party had clearly articulated — on the need to ascertain if one particular school structure provided ‘better’ education for this age-group than any other.

In setting up the Sunset Junior High School model, the first comments made to the press by Junior High spokespeople suggested the new structure would “drop a holistic or home based teaching system for a more specialist teaching regime.”<sup>45</sup> The model articulated in the press indicated that Sunset would follow the American junior high school model<sup>46</sup> of teams of specialist teachers sharing a group of students. It is probable that the initial lack of secondary opposition was due in part, to the fact that these spokespeople advocated a structure very similar to that offered by secondary schools, though this was not exclusively the reason. Owing to its roll size and geographic location, Sunset’s move to a middle school status was not seen to be a real threat to the high schools in the city. Only RBHS reacted publicly against the announcement.

However, other middle school lobbyists were quick to refute the junior high structure and suggested that Sunset really meant to say that the “trend is not towards specialist teaching but an expanded holistic approach.”<sup>47</sup> The very first

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45. Bradley, L. (1996, December 3).Sunset takes the plunge. *Rotorua Review*, p.1.

46. The various elements of junior high schools and middle schools are outlined in greater depth in chapter 5.

47. Bradley, L. (1996, December 30).Spare a thought for middle schools. *Rotorua Review*, p.4.

school structure debate therefore, centred on the difference between the junior high model and that of middle schools. As one commentator for the middle school structure suggested “the opportunity now exists to create an educationally sound middle school unique to the needs and culture of New Zealand, rather than a faulty one borrowed from somewhere else.”<sup>48</sup>

The desire to pursue the ‘junior high’ name owed, in part, to the influence of the deputy principal, Sue Berryman, who had attended a Junior High School in America and enjoyed the experience. Berryman spoke of “graduating gowns: mortarboards; [and the] end of Junior High School Prom.”<sup>49</sup> The issue of the importation of ideas from the American educational community has already been explored in greater depth elsewhere in this dissertation (Chapter 6). This is a further example of the influence of one person (such as this Deputy Principal) and policy importation upon educational change. As a commitment to the junior high school structure, however, it was not strong. By early 1997 both the principal and deputy principal had distanced themselves from the specialist label.<sup>50</sup> Both referred from 1998 to a middle school structure while maintaining the “Junior High” nomenclature.

The new principal, Turi Ngatai, had needed to draw attention to his new look intermediate school to combat a further year of falling rolls. The suggestion of a specialist approach had been expressed in an attempt to “repackage” Sunset in the educational market place. Once in the press and in the public forum, however, the “Junior High” philosophy of specialist teachers did not sit comfortably with the

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48. Hinchco, B. (1996, December 5) Letter to the Editor. *The Daily Post*, p.4.

49. Bradley (1996, December 30), p.1.

50. Editor. (1997, March 11). Sunset yes to option. *Rotorua Review*, p.1.

middle school philosophy. Ngatai also quickly discovered that the junior high model did not differentiate the school from the local high schools but rather that the middle school model could provide this structural difference. However, once in the press the name Junior High had struck a chord of difference from what other schools could offer and so remained in use.

While the initial start to the middle school movement in Rotorua revealed some uncertainty about the issue of name and style of middle school to be offered, this can in part be attributed to a lack of educational research and rigour on the part of the Sunset school management team. Often the best form of defence is attack, and the new principal at Sunset, rather than just addressing the underlying reasons for a falling roll, also offered a new vision for the school as a means to gain public attention. This attention was not long in coming. The principal of RBHS commented in February 1997 “middle schools may fail to provide the base level of knowledge and skills students will need for subjects such as the sciences, graphics, accounting and foreign languages.”<sup>51</sup>

In an article entitled “*Secondary schools will survive*” Grinter, responded to an earlier article in which Crossman, principal of Mokoia Intermediate School had suggested that middle schools may take on the role of secondary schools as they currently existed. Grinter outlined the standard secondary school response that middle schools, growing out of intermediate schools, lacked the experience and expertise to deliver third and fourth form programmes. Grinter stated “the

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51. Grinter, C. (1997, March 4). Secondary Schools will survive. *Rotorua Review*, p.9.

question then becomes can a primary-intermediate trained teacher adequately teach the third and fourth form curriculum?"<sup>52</sup>

While this type of statement ignored an earlier local issue — that Rotorua secondary schools had attracted a large number of trained teachers from the local intermediate schools to teach in their colleges — it did raise the point that there were academic disciplines that intermediate schools were not staffed for nor have the facilities to teach. In the same article reference was made to a number of further issues such as the involvement of unions (which will be discussed later). From the very outset of the public debate, school structure dominated discussions with regard to middle schools in Rotorua.

In early-1997 the RBHS board of trustees began investigating the possibility of a Form 1 to 7 structure. It may have been coincidental that the secondary teachers' union, the Post - Primary Teachers Association (PPTA), advocated the use of this scenario as a defence against local middle school initiatives in their manifesto on this topic, "*The Shape of Schooling*".<sup>53</sup> RBHS had traditionally been a Form 1 to 7 high school but had lost their Form 1 and 2 students upon the establishment of Rotorua Intermediate School in 1958. The return to the roots of the school, as a Form 1 to 7 institution, held a degree of romantic appeal within the city. It served as a timely reminder that school structures frequently vary according to the educational fad of the day, and raised the doubt that the middle school movement might, in fact, be just another passing fad. Certainly, the change in label from

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52. Grinter (1997, March 4), p. 9.

53. Post-Primary Teachers Association. (1997). *The shape of schooling: Information and advice for members affected by school restructuring initiatives*. Wellington: NZPPTA.

specialist junior high to a holistic junior high did little to reassure the general public that the middle school movement was a well-researched alternative.

In response, Crossman, now President of the NZISMA published a number of articles. In March 1997 he referred to research carried out by Stewart and Nolan that “backs up our claims that the middle school option is the most effective learning institution for the 11 to 14 age-group.”<sup>54</sup> The Stewart and Nolan research formed the most extensive academic research available within the New Zealand context at this time. In the same article Crossman went on to attack the suggestion of a Form 1 to 7 school structure:

There is a belief that Form 1 to 2 students can actually be disadvantaged in such schools due to their being down the pecking order in relation to resource usage... The other belief is that leadership and initiative can be stifled while Form one to four pupils wait in the “holding pen” for senior school.<sup>55</sup>

These arguments were further developed in mid-March when another article by Crossman appeared in the *Rotorua Review* titled “Middle schools ‘merely offering an alternative’.”<sup>56</sup> In this article he refuted many of the arguments raised by the secondary school movement, notably the PPTA, in favour of Form 1 to 7 schools. He made reference to; the high level of suspensions among third and fourth formers, that there was now a national curriculum that teachers could teach across sector schools, that resources in high schools were traditionally not available to third and fourth forms as these resources are directed more often to the senior

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54. Shelton (1997, March 4), p.2.

55. Shelton, (1997) p.2.

56. Crossman, D. (1997, March 18) Middle schools ‘merely offering an alternative’, *Rotorua Review*, p.9.

classes, and that “a more holistic and personal style of teaching may well solve the present secondary problems.”<sup>57</sup>

While the local press devoted considerable column space to the pro-middle school lobby group within the city — taking the opportunity to express both the middle school model and to attack the secondary Form 1 to 7 model — this did not lead to any conclusive evidence that one school structure better catered for the needs of emerging adolescents than any other. Much of the rhetoric expressed by commentators came from; personal belief, teaching experience in differing structures of schooling, from readings of international documents, or anecdotal reflections within New Zealand. For example Ross Lamb, principal of Southern Cross Middle School, on a visit to Rotorua at the request of Sunset Intermediate, commented that:

A middle school is geared to students. They are not in conflict or in competition with high schools or intermediates — essentially middle school take on the best of both worlds.<sup>58</sup>

Considering the developments occurring within Rotorua these comments, while making for interesting public consumption, were naïve concerning the political implications surrounding the change of class debates that were to come. While the middle school lobby group had strong representation in the local papers, by contrast the secondary schools, apart from RBHS, did not present their case at all. If the middle school information lacked research rigour it did at least contain passion and made reference to whatever research material was available, such as the early work of Richard Ward in Hamilton. However, RBHS did not produce

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57. Crossman, D. (1997, March 18), p.9.

58. Bradley, L. (1997, March 20). Middle school option backed. *The Daily Post*, p.3.

any research to support its suggested Form 1 to 7 model, although such support was available from the 1962 Commission on Education, (the Currie Commission), that had supported the establishment of Form 1 to 6 colleges especially in rural areas. It remains a matter of speculation to what degree the silence of the high schools had in forming public opinion on these issues. Perhaps there was no need for secondary proponents to create a case, or equally, the lack of a case may have been seen by the public to have been a weakness.

The only argument to appear in the local press concerning the structure of education for emerging adolescents, other than that of the middle school movement, was presented in a letter to the editor of the Daily Post by an inveterate letter writer on educational issues, Hugh Wilson, who stated:

They [a majority of competent teachers] are aware that educational trends come and go like the seasons, and that standards of behaviour and academic performance are not improved simply by regrouping the students in different environments.<sup>59</sup>

A similar belief was to be reiterated two years later by the Ministerial Working Party. This, however, is not the case with the issue of girls at single sex high schools or the development of Kura Kaupapa Māori schools for Māori students, as just two of many examples where students are regrouped in different environments to improve their academic achievement.

However, the entry of a second intermediate school into the middle school debate, especially after a prolonged period of very positive middle school press, forced the high schools to re-look at their stance towards the structures of schooling

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59. Wilson, H. (1997, March 20). Mailbag. *The Daily Post*, p.4.

within the city. Early in 1998 a new school entered the debate for the first time; Rotorua Lakes High School (RLHS). Much of their involvement in this debate centred on the issue of the ‘domino effect’ raised by the chairperson of the RLHS Board of Trustees, Allan Kilgour, in a report published in February 1998. Kilgour made the following pertinent comment regarding the school structure debate:

[our] concerns were also the fragmentation of the students in this “middle group”. Some are going through the primary school system up to form two, some are going to middle schools and then some to high schools. We’ve got students coming through three different systems and I just wonder whether we’re going to get some consistency in education.<sup>60</sup>

The debate then focused also on full primary schools. The debate over school structure was further clouded by comments from the principal of Rotorua Intermediate, Jack Hourigan, who supported the current intermediate school structure.<sup>61</sup> The “emerging adolescent”, was thus being offered at least four possible school structures. In addition to the issue of parental and community choice for the education of their children, which will be addressed later, the discussion over school structure by early 1998 had become quite confused. The principal of Western Heights High School (WHHS), Byron Bentley, made this point when he commented, “there is no credible educational reason that existed for any of Rotorua’s schools to change status at the expense and educational viability of any other school.”<sup>62</sup>

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60. Shelton, A. (1998, February 26). Education fragmenting high school board told. *The Daily Post*, p.2.

61. Hourigan, J. (1998, April 17). High school move ‘not in student interests.’ *Daily Post*, p.20

62. Shelton, A. (1998, March 13), p.1.

The ministerial working party had as one of its central criteria to “study appropriate research of school structures.”<sup>63</sup> By appointing Professor Ramsay to the working party the Minister was in part signalling a desire to see presented, if possible, some evidence that would suggest that one school structure offered greater educational merit than any of the alternatives. Even though the working party received numerous submissions from interested groups suggesting that one school structure was better suited to the needs of the emerging adolescent than another, such as “... the middle schools presented a carefully researched educational philosophy,”<sup>64</sup> and also requested interested parties to provide them with evidence of the research that supported their claims, in effect no conclusive evidence was forthcoming. To this end the Keaney report stated:

The working party has been unable to locate research, which suggests that one form of school structure is superior to any other in terms of children’s attainment.<sup>65</sup>

However, as mentioned earlier, the working party accepted the submission from Kaitao Intermediate that while evidence may not exist at the moment that did not mean that one form of school structure might not better suit the needs of emerging adolescents than another. As a result the Keaney committee’s second recommendation suggested that educational initiatives be set up within the city to provide educational research on changes that may be trialled. The committee stopped short, however, of suggesting that one of these trials may well involve opening a middle school class in one of the existing intermediates.

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63. A request was made by the ministerial working party for a submission to be made with a reference list of such school structure research from any of the proponents of middle schools. One such list was provided with the Kaitao submission.

64. Crossman, D. (1999, March 3). *Mokoia Intermediate submission to the working party*.

65. Keaney, J., Ramsey, P., & Searancke, G. (1998). *Rotorua District School Structures Ministerial Working Party Report*. Rotorua: Ministry of Education, p.2.

Throughout the period examined in this case study, the public debate frequently returned to the issue of educational pedagogy and the debate over the best school structure to meet the need of this age-group. While other issues also arose, it is important to recognise the place that pedagogy occupied in the press debate as much as in the debates between the various interest groups.

## IMPORTATION OF POLICIES

An issue raised in the discussion over school structures in chapter 4 was that of the importation of policies. In this case study several clear indicators exist of policy importation and the effect these had on the development of educational change in this community. At the international level the involvement of the National Middle Schools Association (NMSA) can be readily recognised. This link to the international association was enhanced by the visit to the American international middle schools conference in 1996 by the deputy principal of Kaitao Intermediate, Brian Hinchco, the author of this research. The intention of this visit was to gain information to support the application for middle school status and to establish contacts with middle schools in America. These goals were achieved both by attending the conference and gathering information from key speakers as well as having the opportunity to visit three model middle schools within the United States.

Policy importation at this level can be found in the background material made available to (and by) the middle school proponents in this case study, including the links that key personnel had to particular support networks and the first hand experience of successful middle schools both internationally and within New

Zealand. During the period reviewed in this case study, for example, this researcher visited three international and two national middle schools.<sup>66</sup> The city was also visited by Ross Lamb who was principal of a New Zealand middle school, Southern Cross Middle School, and Geof Mooar an intermediate school principal and public supporter of middle schools.

The involvement in the city of three presidents of the New Zealand Intermediate and Middle Schools Association; Don Crossman (president during the period reviewed in this case study), Ross Lamb (a past president), and then Geof Mooar (president after Crossman) drew a close link between the New Zealand national movement and the local community level. A further example of policy importation was the involvement of Sue Berryman at Sunset Junior High. She had been educated at an American Junior High School and expressed a personal preference for this style of education. The name “Junior High” rather than middle school, one of only two in New Zealand,<sup>67</sup> can be attributed to her involvement and position as deputy principal at Sunset.

Another example of policy importation was that concerning the attached unit, made possible by a loophole in the Education Act, as mentioned earlier. After the Minister of Education announced the establishment of a working party and a moratorium on setting up middle schools, there was considerable debate over using this ‘loophole’ in the Education Act to thwart the Ministerial moratorium on change of class. This loophole was made possible by a clause in the 1989 Education Act that allowed for the establishment of attached units, or classrooms,

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66. Shelton, A. (1998, April 9). Change in schools wonderful: Mooar. *The Daily Post*, p.2.

67. The other is Tweedsmuir Junior High School in Invercargill so named because there already existed an Invercargill Middle School named because of its physical location in the city.

from one school to be established in another. This clause was frequently used to establish satellite classrooms from special needs schools in mainstream schools to aid the mainstreaming of special needs pupils.

This clause had been used in south Auckland where Fergusson and Bairds Road Intermediates had been refused middle school status by the Minister of Education. These schools approached local secondary schools which agreed to set up attached classrooms of middle school students in their schools. In reality the two intermediates held onto those third formers who wished to stay while claiming them on the roll of the secondary school for funding purposes by mutual agreement of both schools. This idea held appeal to both RBHS and Kaitao as means to circumvent the decision of the Minister. Discussion in the press — which suggested that the two schools may well begin to work together in mutual co-operation — further fuelled the opposition of schools, such as WHHS, who predicted losing students on both fronts.<sup>68</sup>

The reporting of visiting educationists' viewpoints in the local press revealed a fourth example of policy importation. In April 1998, for example, John Lawson, a visiting principal from the United Kingdom, was asked to comment on the Rotorua middle school debate. Without a great deal of time in the city or an awareness of local issues, he was quoted as saying:

In England middle schools had come and gone, their usefulness explored and discarded... But in New Zealand schools here are taking their cues from American middle schools, which are apparently doing very well.<sup>69</sup>

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68. Shelton, A. (1998, August 26). WHHS wants loophole closed. *The Daily Post*, p.2.

69. Shelton, A. (1998, April 14). UK Principal bewildered by changes. *The Daily Post*, p.2.

The reality was, however, that several counties in the United Kingdom continued middle schools as part of their educational structure. Apart from the obvious observation of the distrust with which many English educationists hold towards American educational processes, the quote also begs the question of why middle schools may be more successful on one continent and not on another. Rather than shake the resolve of the middle school movement in New Zealand, at least in the opinion of John Lawson, Rotorua schools intended following a successful American model rather than one of the failed English models. As with many similar press releases Lawson's credentials were not explained or his own experiences of middle schools investigated. A number of such "expert" opinions were sought and published by each of the protagonists in this case study and such opinions formed an important aspect of policy importation which informed debate during this period.

## INVOLVEMENT OF KEY PERSONNEL

The key theme of this thesis has been to investigate the balance that existed between politics and pedagogy within the developments of middle schools and specifically within this case study. Evidence has been gathered of the influence key people have had on schooling developments in the city and the part they had to play in developing the arguments surrounding middle schooling as an educational alternative. From the discussion on policy importation it was noteworthy that a number of key educationists were invited to comment on the development of the middle school debate as it occurred in Rotorua. Many of these key people added to the depth of the pedagogical debate rather than undermined it. They were from varying educational philosophical viewpoints, but each added

to the development of the debate. In contrast other key personnel, often from political and or union backgrounds, contributed to the debate from a more purely political perspective.

Two such key personnel were the President of the PPTA, Martin Cooney and the Associate Minister of Education, Brian Donnelly. Throughout the years reviewed in this case study the primary teacher union, the New Zealand Educational Institute (NZEI), made no public comment on the educational debate occurring in the city. The NZEI had an active branch in the city and members who were involved in the pedagogical debate were also vocal NZEI members. However, the only comment on this issue made by the NZEI was in the form of one submission to the Keaney working party, stating that they wished to see the collegial support that the profession in the city enjoyed maintained by the recommendations of the working party. This stance was in stark contrast to that of the PPTA.

In January 1997 the Rotorua Daily Post published an interview with the PPTA president, Martin Cooney, on its editorial page. In this article he commented “the government’s policy on the development of middle schools is fundamentally flawed and doomed to failure.”<sup>70</sup> Renowned for emotive hyperbole, Cooney’s comments attacked the newly established coalition government’s agreement that sought to remove all barriers to the establishment of middle schools. The article went on to reiterate the PPTA’s stance that there might not be classroom places in the fifth form at secondary school for graduates of the middle schools. It finished with the comment that a better solution to catering for the needs of 10-to-14-year-

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70. New Zealand Press Association. (1997, January 6). Middle school policy flawed, says PPTA. *The Daily Post*, p.6.

olds “would be the development of urban Form one to seven schools with quite distinct but linked junior and secondary departments.”<sup>71</sup> Similar views to this were expressed at a later time by the principal of RBHS and such evidence suggests that this is one example where policy was transmitted between various commentators of this debate. Importation of new policies was frequently transmitted between different members of similar pressure groups.

The PPTA suggested separate junior and secondary school structures — albeit on the one school site — that catered differently for the varying needs of the two age-groups. However, intermediate schools seeking middle school status were less likely to support this suggestion because in each instance within the city they were sited geographically apart from their local high school. The distinction suggested in this article, however, was lost less than a month later when Grinter outlined the possibility of a single Form 1 to 7 at RBHS. The RBHS proposal — for an integrated Form 1 to 7 school to operate under the single auspices of one school structure — with minor modifications for the junior students, shifted the debate from an alternative middle school structure.

Direct involvement from Martin Cooney in the Rotorua discussion was revealed in an article written by Grinter when he referred to the :

Secondary Teachers’ Union president Martin Cooney who reminds parents potential exists for educational sector industrial action in relation to the middle school proposal. Parents may wish to bear this in mind in deciding whether middle schooling is the best.<sup>72</sup>

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71. New Zealand Press Association (1997, January 6), p.6.

72. Bradley, L. (1997, March 4). Secondary schools will survive- Grinter. *Rotorua Review*, p.9.

The threat of industrial action by the PPTA president had been made previously in the New Zealand Herald but had not — prior to this article in the Rotorua Review — been reported in the local press. Educational matters at the time were at a delicate stage with the beginnings of discussions on pay-parity and, later that year, with Cooney's removal from office by his own union. However, this example of policy transmission, repeated as a veiled threat by a local principal in what was then a strongly conservative community, did a good deal to influence those who may have been considering the middle school option. In 1997 it would have been easy to over-estimate the degree of public interest in this topic, but by early-1998 this interest had significantly increased. This threat of industrial action was an important aspect of this local debate and repeated long after the unions had sorted out their disagreements over pay-parity.

## POLITICAL WILL

A second key educationist in the development of middle schools in Rotorua was the Associate Minister of Education, Brian Donnelly. Prior to standing for parliament as a New Zealand First candidate he had been an intermediate school principal in Whangarei, and as such, had been involved in the development of one of the first middle schools in New Zealand, Raumanga in Whangarei, established in 1995. Donnelly attended the Waikato/Bay of Plenty Intermediate Principals' retreat in March 1996 prior to being elected as the New Zealand First spokesperson on education, and then again in 1997 and 1998 as the Associate Minister of Education.

It perhaps came as no surprise that the coalition agreement between New Zealand First and the National Party contained a clear statement on the removal of barriers to the establishment of middle schools. After the announcement by Sunset Intermediate that it was seeking Junior High status, Brian Donnelly ensured that he spent time at that school each time he was in Rotorua. By November 1997, with the announcement of Kaitao Intermediate's intention to become a middle school, the local newspaper could report "but Associate Minister of Education Brian Donnelly had told Mr. O'Rourke that by the time Kaitao was a middle school the fiscally neutral clause will no longer be an issue and the barriers to intermediates becoming middle schools will have been removed."<sup>73</sup>

The Minister of Education, Wyatt Creech, announced that Sunset had approval to become a junior high school however, it was "approved by the Minister despite serious problems [being] highlighted by the Ministry [of Education]."<sup>74</sup> In this article two problems facing this application are attributed to the Ministry's paper to the Minister; the first, that the ministry did not have confidence in the intermediate school being able to deliver a secondary curriculum and secondly, that Rotorua currently had sufficient secondary classroom space. Furthermore, the "Associate Minister of Education, Brian Donnelly, said the Ministry failed to convince him and Education Minister, Wyatt Creech, that the applications should not be approved."<sup>75</sup> In the 18 months that Brian Donnelly was Associate Minister two schools, Sunset and Berkley Intermediates, received approval to become middle schools. In the final 18 months of the National minority government only

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73. Shelton, A. (1997, November 20). Kaitao unveils plans *The Daily Post*, p.1.

74. Hotere, A. (1997, December 10).Creech veers into middle. *Education Review*, p.1

75. Hotere (1997, December 10), p.1.

one further school received approval,<sup>76</sup> and since the election of a new Labour Alliance government, in late 1999, no new middle schools have been approved.

Certainly key personnel within education in Rotorua saw the development of Sunset Junior High School as an example of political will dominating over pedagogical thoughtfulness. Linda Woon, Principal of Kawaha Point Primary school and President of the Rotorua Principals' Association during 1997-1998, commented that:

Competition is certainly part of the political will. Wyatt Creech and Brian Donnelly (Education Ministers) have both said that they will be supportive of changes in status of schools, unless they seriously endanger the viability of another school... So it's part of political will of market forces.<sup>77</sup>

This quote drew attention to a key belief that any school change must be viewed in the light of the impact it will have on other schools in its vicinity. The Ministry of Education, in its report to the Minister was charged, as part of its review process, to identify the possible impacts a change-of-class application might have on other schools. In support of this, various ministers had assured principals that the impact report was one of the key deciding factors governing their decision to grant or deny a change-of-class. Certainly, this raised a number of political implications that lie outside of the pedagogical constraints of what might be best for the individual student.

In June 1998 this theme, of the change-of-class conforming to a political will, was reiterated in a series of statements made by Donna Awatere-Huata, the Act Party

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76. Cambridge Middle School under Minister of Education, Nick Smith.

77. Campbell, P. (1998, May 5). Education debate matter of schooling around, *Rotorua Review*, p.11.

spokesperson on education, who claimed that she was “in favour of schools changing their status because she believes there needs to be more choice in schooling.”<sup>78</sup> Throughout 1998 commentators with a more neo-liberal approach to this debate suggested that the political environment supported educational choice and that the granting of changes of status would become more prevalent. Even in the Mokoia Intermediate’s submission to the Working Party, made as late as March 1999 (after the coalition government had collapsed and the Minister had put changes of class in Rotorua on hold) Crossman could write “the origins for this present situation lie in one of the basic results to Tomorrow’s Schools, the uncontrolled implementation of choice.”<sup>79</sup>

The influence of a political climate and environment cannot be underestimated in supporting or holding back change in the educational sector. The political will of Ministers, the stated policies of parties elected to government, and the pervasive economic and political climate determined to a greater extent what was possible to achieve in this local educational community. This situation was further compounded by the influence of national union bodies. While unionism itself was considerably weakened during the years reviewed by this case study — as a deliberate policy of a conservative right wing coalition government — at least one educational union, the PPTA, remained relatively strong and vocal on issues such as middle schools.

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78. Shelton, A. (1998, June 26). Needs to be more choice: Huata. *The Daily Post*, p.3.

79. Crossman, D. (1999, March 3). *Mokoia Intermediate Submission to the Ministerial Working Party*.

## THE UNCONTROLLED IMPLEMENTATION OF CHOICE

The influence of educational policies and directions that evolved from the implementation of *Tomorrow's Schools*, as a political framework for educational change, played an important role in this case study. As early as December 1996 the deputy principal of Sunset Intermediate could comment "the beauty of Tomorrow's Schools and the New Zealand Curriculum Framework is that it provides schools with the flexibility to create programmes that cater for the individual needs of its students in innovative ways."<sup>80</sup>

Such a spirit of optimism and such statements of possibility for change combined with the broadening understanding of parental choice were echoed by other commentators in the local press. One such commentator, J. Staal, referring positively to the application by Sunset to seek middle school status, mentioned the Convention of the Rights of the Child that New Zealand had ratified in March 1993. This convention stated:

Parents have the primary responsibility for the upbringing of the child. The state shall support them in this. The state shall not intervene with the liberty of individuals and bodies to establish and direct educational institutions.<sup>81</sup>

Devolution of responsibility for the education of their children to parents played an important role in the creation of political policies of choice throughout the period covered by this case study. On the one hand, certain articulate parents were requesting the broadening of educational choice within the city, frequently encouraged by vested educational sector groups. On the other hand, school principals and boards of trustees were concerned that unlimited choice would

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80. Sawyer, H.(1996, December 17).Letter to the Editor. *Rotorua Review*, p.4.

81. Staal, J.(1996, December 17).Letter to the Editor. *Rotorua Review*, p.4.

impact negatively on the collegial support networks that existed between the schools within the city, and on certain schools in particular that were perceived to not be performing as well as others.

During 1997 Crossman spoke in favour of Sunset changing class, partly because something needed to be done to maintain its viability in a falling roll situation, and partially owing to the fact that it did offer an alternative to the existing school structures within the city. However, by 1999 he could also argue that allowing both Kaitao and RBHS to change would negatively impact on the city, a little like opening a Pandora's Box. As President of the Intermediate Association he could argue in favour of one "failing" intermediate school seeking a change in class as a means to ensure viability, but as a principal within the city the idea of several schools changing class and possibly undermining the existing collegial network among schools — at the very least — or creating the need for most schools to seek a change a class — at the very worst — was too much for him to contemplate.

Each of the schools (except for Sunset Junior High) seeking a change of class at some time referred to that change as being parent or community driven. Phrases such as "the move follows middle schooling support expressed by some parents," or "change must be parent or community driven," were often used. However, except for Kaitao's application, little supporting evidence of wide-spread parental consultation was provided to the ministry of education office in Hamilton. Furthermore, the following question typically arose in this context, was it the role of the principal to give voice on behalf of minority groups in the community? This apparent desire to respond to parental choice was so great in some areas that

one participant suggested “what is also needed is a change in the Education Act to enable communities to exercise more choice with fewer administrative obstacles.”<sup>82</sup> The optimism of *Tomorrow’s Schools* policy reported earlier was insufficient for the needs of a school that wished to be seen, in the press at least, as being more answerable to parent and community choice than were its counterparts and competitors.

The rhetoric of accountability to parental choice, however, was balanced by Rotorua Girls’ High School (RGHS) report that “there was no support [for change] either from students or staff. We have not had one parent, not one person, contact the school saying that we should go form one to seven.”<sup>83</sup> However, the question remains, was this the same for most of the schools in the city? If this was the case then, were those schools that sought to respond immediately to the minority parental search for choice putting too great a burden on the others? Individual choice had far greater implications than merely a change in class for the local intermediate school. This dichotomy, between the needs of the individual schools to be answerable to the perceived needs of their parent communities and being aware of their responsibility to the wider community of schools in the local area, raises within this case study the duel and potentially conflicting responsibilities that increased choice creates.

## THE DOMINO EFFECT

As early as January 1997 one of the first reactions to the suggested change of class for Sunset Intermediate was the suggestion of an urban Form 1 to 7 school.

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82. O'Rourke, R. (1997, March 20). Finding middle ground in the schools debate. *The Daily Post*, p.4.

83. Warwick, L. (1998, March 20). RGHS joins schools debate. *The Daily Post*, p.2.

This suggestion, from the President of the PPTA, Martin Cooney (while also constituting national PPTA policy in response to communities seeking middle schools) was repeated in early March, by the Principal of RBHS “certainly in Rotorua, there is no doubt that a Form one to seven option, provided at say Rotorua Boys’ High School, would attract significant interest from parents in Form one and two.”<sup>84</sup>

The announcement of Sunset’s intentions to consult their community regarding middle school status was not driven by issues of parental choice. At no time in the local press did any spokesperson from Sunset claim to be responding to requests from parents or their community. Instead, it was an attempt by a new principal to re-engage his community in debate about the future of their school by suggesting a radical new direction. The domino response by RBHS, similarly, was not driven by community responsiveness but was a political reaction to what was perceived to be a possible threat to future enrolments. In fact, RBHS did not seek parent or community response to their suggestion of forming a Form 1 to 7 school until the following year when undertaking the community consultation process as part of their application for change-of-class.

However, when in March 1997, Kaitao Intermediate entered the middle school debate, with its announcement that it would pursue a middle school status; many of its initial motivations were lost to the general public in the ensuing press debate. The fact that Kaitao had appointed this researcher as Deputy Principal in late 1993 on the understanding that the concept of middle schooling was one that the Board of Trustees was interested in; had sent him to the American middle

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84. Grinter (1997, March 4.), p. 9.

schools conference in late 1996; and had already a number of parents who had chosen to send their children to Kaitao in the belief that the Board was looking closely at the middle school concept; tended to be overshadowed by the domino effect of various announcements that were made in the press, especially during early-1998.

Therefore, by February 1998 Sunset Intermediate, Kaitao Intermediate, Te Kura o Kaupapa Māori o Te Koutu and RBHS were all involved in seeking community input into their respective change-of-class applications. One month later WHHS<sup>85</sup> also signposted the fact that they would also pursue Form 1 to 7 status in response to RBHS, and in the same month Ngongotaha Primary indicated that it was interested in recapitating Year 7 and 8 students. In the case of the latter school the local press simply noted "Mr. Morrison said he was proposing a change of [sic] status for Ngongotaha because of action taken by RBHS, WHHS and Kaitao Intermediate."<sup>86</sup>

The domino effect of the announcement of one school on the decision-making processes of another is an interesting aspect of this case study. Since the announcement in March 1997 of Kaitao's intention, full consultation with WHHS had been undertaken. During these discussions Kaitao had maintained that the number of students involved in the first year would be only 25 students, the equivalent of one full class of third formers. This was predicted to rise to four classes of third and fourth formers, if parental interest was maintained, in four

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85. "To protect its roll growth and viability Western Heights High School will apply for form one to seven status in 1999." Shelton, A.(1998, March 13). Principal sees chaos for schools. *The Daily Post*, p.1.

86. Shelton, A. (1998, March, 25). Ngongotaha Primary seeks status change. *The Daily Post*, p.3.

years time. These four years were also predicted to be roll growth years for both schools and the impact would not have been great on the high school. While Kaitao was the largest contributor of students to WHHS the college had, in recent years, made significant in-roads into two other local intermediate schools. This, coupled with the predicted roll growth in all schools in the area, and the increased retention of their senior students would have meant that the number of students being suggested by Kaitao would not have negatively impacted on the roll growth occurring naturally at the high school.

Furthermore, the intention had been to draw up a sister school relationship between the two schools so that children would be encouraged to flow from the middle school onto the high school. Only two days before the high school's announcement to seek Form 1 to 7 status the local press published comments by the high school board of trustees' chairperson supporting the concept of the sister school initiative. A sister school relationship involves "a reciprocal agreement where third and fourth formers from each establishment could take advantage of classes at the other."<sup>87</sup>

However, by the beginning of June 1998, when the Ministry of Education circulated the change-of-class applications to other affected schools for their consultation, no application had been received from Ngongotaha Primary. It appears that the announcement made in March by the school was deliberately made to add to a sense of confusion among the public of the city and to force the hand of the Ministry or Minister to act, as a politically motivated announcement.

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87. Shelton, A.(1998, March 11).WHHS and Kaitao consider teaming up. *The Daily Post*, p.3.

If this was the intention then it had the desired effect, for the Minister announced a moratorium on change in July 1998 and set up the ministerial working party.

The report of the Keaney working party sheds an interesting light on this discussion of a domino effect existing among schools. In its conclusion it stated “if a further middle school is added to the Rotorua system, and it begins to attract a large number of students, then in self-defence other schools may move to such a system.”<sup>88</sup> Reading between the lines of the ministerial report, therefore, the city of Rotorua could sustain one middle school at Sunset because of its small roll, and the fact that it was unlikely to grow to any great size owing to its geographical and socio-economic environment. However, if the middle school movement spread to a second school and was found by the parents to be a successful model, then it could have a significant impact on the sizes of a number of other schools. The extent to which the application of Kaitao was thwarted, because other schools believed that it would be successful, lies outside the information available from the local press, but makes for interesting conjecture.

The recommendation of the working party to hold any developments in change-of-class in the city for five years to allow for a process of planned change, could then be seen to be a vote of confidence in the pedagogy of middle schooling as much as it was a desire to provide a “cooling” period to allow for the working out of issues inherent in the implementation of *Tomorrow’s Schools*. The support of the working party for a middle school approach, can also be suggested by their second recommendation. Educational initiatives, it was suggested, should be trialled in the city over the next five years — led by researchers — to gather

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88. Keaney, et al. (1998), p.6.

evidence that supports the claims made by the various interest parties during the working party's consultation process.

## MAORI EDUCATION

Within this case study the issue of providing for the needs of Māori students appears to have sat outside most of the mainstream debate. Initially, application by the Kura Kaupapa o Koutu to change class to a composite school received no press space and little mention by the educational institutions themselves. Schools affected by the change in their class were consulted but little documentation on this application was returned to the Ministry. Their application was granted in July, at the very time the Minister halted all other changes.

The working party's brief included the parameter "to investigate the achievement of all learners and to reduce the disparity for Māori learners."<sup>89</sup> In its submission, Kaitao Intermediate, stated that the middle school-whanau style structure of the homeroom for the Form 1 to 4 years, would best suit the learning needs of Māori students. However, RBHS also claimed that offering a Form 1 to 7 structure would better enhance the learning of Māori boys. They claimed that intermediate education saw boys turned off Māori language and learning in general, and that they needed to support these learners for a full seven years. This claim and counterclaim is an example of national concerns and rhetoric becoming reflected in the structure of individual educational institutions. Little, if any, conclusive

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89. Keaney, et al. (1998), p.1.

research existed in the late 1990s that indicated one preferred school structure for Māori students.<sup>90</sup>

However, the working party made reference to these two opposing claims and suggested that both systems be set up, trialled and researched to discover which, if either, were in fact true. In a sense this debate on Māori education is a microcosm of the larger pedagogical debate of school structures and their bearing on student learning. While current international research suggests that school structure is not a strong determinant in student learning this may well be because of the nature of the research undertaken to date. Detailed research in this area could find trends and preferences in school structure influenced by context and demography.

## CONCLUSION

This case study of educational change as it occurred in Rotorua between 1996 and 1999 highlighted a number of key issues in the discussion between the influences of pedagogy and politics. While much of the debate carried out in the local press centred on the issue of school structure and, therefore, by assumption concerned educational pedagogy, this was not the key determinant of the changes that did occur. In fact, the lack of conclusive evidence that any one school structure was more effective in catering for the needs of the emerging adolescent than any other had little effect in this case study, as is highlighted by the fact that one intermediate, Sunset, gained middle school status while the second, Kaitao was declined.

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90. It is worth noting that research available in the early 2000s (Neville, 1999; Bishop, 2003) suggests that middle school pedagogy may in fact assist Māori student achievement.

The reasons why one intermediate school was granted middle school status while its neighbour was declined rests more on the politics of this case study than with the pedagogy of middle schooling. Had any of the parties referred to the work of Sunset as being a trial for the city, and as such an exemplary institution set up for the purpose of research gathering, then those supporting the Kaitao bid may well have been content to wait before presenting their application. However, this was not the case. Sunset had not been seen in the local or national educational community as a pedagogical trial for middle schooling. Even the ministerial working party, during its explanations for setting up educational trials, did not refer to Sunset in this category.

Furthermore, the election of the National-New Zealand First coalition government in late-1996 and their agreement to remove barriers to the establishment of middle schools goes some way to explaining the success of the Sunset model. That the Associate Minister of Education, Brian Donnelly, took a personal interest in the application from Sunset Intermediate cannot be underestimated. Similarly, the collapse of the coalition government in 1998 and the appointment of a new Minister of Education, Nick Smith, who was at some pains to distance his government from the policies of the coalition administration, go some way towards explaining the loss of Kaitao's application.

This case study further demonstrated the need for central government to intervene when a community takes the *Tomorrow's School* rhetoric of parental choice too seriously. The reality of clashes forming over opposing educational beliefs can be a reality as outlined in this case study. The setting up of a working party allowed

the government to distance itself from the local politics of Rotorua while appearing to devolve responsibility for decision-making to communities and local schools. The use of independent “experts” to provide expertise, detached observations as participants on the working party provided the ideal forum from which to achieve the best result for the government of the day.

That the working party had some sympathy for the middle school movement and set out its second recommendation to suggest that the city schools be allowed to trial various school structures during the five-year moratorium could augur well for the success of the middle school movement in the longer term. This case study has also highlighted the interplay of a number of key educational issues relevant to the 1980s and 1990s in New Zealand educational politics, such as; the long term effects of the Tomorrow’s Schools ethos, the policy of parental choice, the market forces philosophies of a number of successive governments, and the place of competition between schools in the same community. In this manner the Rotorua case study provided valuable local evidence of the interplay that existed between politics and pedagogy in the development of New Zealand’s middle schools during the 1990s.

This case study leads now to the concluding chapter wherein relevant conclusions and implications raised by this thesis are drawn together.

## **Chapter Eight**

### **Conclusions and Implications**

This thesis has sought to investigate the nature and extent of the balance and tensions that existed between political and pedagogical factors in the development of a new school structure in New Zealand called the “middle school”. During the 1990s several educationists suggested that the provision of age-appropriate school structures for emerging adolescents was the best course for New Zealand schooling to pursue. This research focussed on the extent to which this claim is supported pedagogically and politically. In this study it was argued that pedagogical beliefs alone were insufficient to facilitate a change in the existing school structures toward the “middle school” model. What was also required was the creation of a political climate conducive to supporting such a change.

The first research dimension, investigated in chapters 1 and 2, was to trace the historical antecedents to the present seven middle schools. Some New Zealand politicians and Directors of Education, it would appear, have often been predisposed towards educating emerging adolescent students in their own stand-alone institutions. As chapter 1 reveals, from the very foundations of a New Zealand education system references have been made to middle schools. Whether it was the Nelson Central School of the 1880s, the Kowhai Junior High School model of the early 1920s, intermediate schools of the mid-twentieth century or, since 1993, middle schools, an identifiable group of New Zealand educationists have argued for age-specific schools for adolescent boys and girls.

While there has not been unanimous agreement among educationists — each of these developments have owed a great deal to the political pressure applied by specific politicians or political parties for their creation — nonetheless the case for age-appropriate schools has been (as Nolan and Brown assert) well developed in the New Zealand educational environment. These various “middle school” developments have owed much to policy importation, principally from America, and to a lesser extent England and Australia. The influence of Wells and Milner on the development of junior high schools during the 1920s; Beeby’s support of intermediate schools (and the influence of the Carnegie Corporation on the development of the NZCER) throughout the following decade; the New Zealand Intermediate and Middle Schools Association (NZIMSA) executive’s direct involvement with NMSA in the 1990s, and then latterly the ease with which New Zealand principals have been able to visit America (and in at least one case serve as American middle school principals) individually and collectively point to the flow of educational ideas from America to the New Zealand environment.

The importation of educational policies and practices provides advocates of a particular schooling model with greater information (and sometimes data) about developments and problems that have already occurred (and will continue to occur). Such detailed research from at least part of the international community generally supports the development of independent middle schools for emerging adolescents. Furthermore, Australian research, which has been imported into the middle school debate relatively recently, lends additional weight to the growing international pedagogical literature which supports middle schools.

Research into the term “emerging adolescence,” — as examined in chapter 3 from the three perspectives of, biology, psychology, and sociology — further supports the concept of a specific age-group. Of these three perspectives, the sociological one, because it subsumed the findings of the other two research areas, provided the strongest foundation for applying existing biological and psychological findings to specific age-appropriate school structures. Sociologically speaking, the need to re-establish a sense of “rite-of-passage” for emerging adolescents suggests that middle schools may provide the best educational environment through their inclusion of carefully designed programmes of work. Middle schools may therefore have an important role to play in assisting human development within the constraints imposed by the compulsory institutionalisation of youth.

Given recent debate over enhancing school and parental choice it is possible that more middle schools may be established post-2004, although this may entail slightly different models to those investigated in this research. The development of private middle schools, such as Mt. Hobson (Auckland); of private middle schools within a full educational campus, such as Kristin School (Albany); and the development of niche-market middle schools such as the Fernyhough school for gifted and talented students (Auckland), points to at least three possibilities. An investigation of the creation of these three types of middle school, in response to enhanced parental choice and a perceived deficiency in the present state education system would be a fruitful line of further enquiry, for it might reveal additional support for the pedagogy of middle schooling.

Within the state schooling sector the reality of falling rolls in several communities may also stimulate the development of stand-alone middle schools, beyond the more populated areas such as Auckland city. The creation of separate Year 7-10 and Year 11-13 schools on the same site, like that announced in 2002 by Wycliffe Intermediate and Colenso High School in the Hawke's Bay, may be further encouraged by the release of the report of the 2003 ministerial review of secondary education.<sup>1</sup> These new middle school models, as those proposed by Nolan and Brown (2002), may also point to the future developments for this structure of schooling.

The second research dimension involved analysing the range of schooling structures available for emerging adolescents and drawing conclusions about the most appropriate age-specific school structure (chapters 4 and 5). The 2001 Education Review Office (ERO) report identified five different school structures currently offered to emerging adolescents. While these structures were found to be wanting in some respect or other, all were meeting these students' needs to a greater or lesser degree in ERO's assessment. However, ERO concluded that the greatest concern within the New Zealand compulsory schooling environment was the fact that Year 9 and 10 students were determined to belong to the "lost generation". While the ERO report acknowledged that middle schooling pedagogy can be and is delivered in a wide range of different school structures, there is ample reason to suggest that the creation of stand-alone middle schools will not be achieved easily. Furthermore, that their creation may, in fact, continue to be controversial.

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1. While this ministerial review has been announced in the press at the time of writing, as of March 2004 the review committee had not been named.

The fact that New Zealand has compulsory school attendance until the age of 16 via educational legislation masks the reality of high non-attendance, truancy and school avoidance behaviour of Year 9 and 10 students in many communities throughout New Zealand. The work of Russell Bishop et al. (2003)<sup>2</sup> concerning Māori student achievement has highlighted the extent of the gap between the myth and the reality of school attendance at the junior secondary school level. A significant barrier to Māori student achievement, this research indicates, is their non-attendance at school once these students enter secondary school. Generally, there are at least three main implications of these research findings that suggest why the development of New Zealand middle schools has been significant. First, perhaps the perceived need from the first middle schools to “hold onto” these students has damaged the formation of strong national relationship with high schools. What may have been needed instead was an initiative on the part of secondary school authorities to find a middle school model that better caters for this age-group. If a joint working party between the key proponents of alternative school structures could be established by the government middle schools could come to embrace more of these disenfranchised Year 9 and 10 students. Nevertheless, owing to the politics each sector group would bring to such an initiative it would need to be mandated by the highest governmental authority.

The second implication arises on account of the increasing number of two-year intermediate schools that have begun to adopt the philosophies and pedagogy of the middle school movement. During the 1980s a small number of New Zealand

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2. Bishop, R., Berryman, M., Tiakiwai, S., & Richardson, C. (2003). *Te Kohitanga: The experiences of year 9 and 10 Maori students in mainstream classrooms*. Ministry of Education: Wellington.

intermediate schools started to adopt policies and practices that were aligned more closely to those of the secondary school. Other intermediates — exposed to the middle school policies and practices, such as greater emphasis on exploration, community service and the use of trusted adults in advisory positions — have begun to adopt strategies that closely resemble those of middle schools. A significant unresolved tension therefore exists within the intermediate school movement that may well hinder the development of a coherent single middle school philosophy.

Third, the present study examined the reasons why the development of New Zealand middle schools has proven to be so problematic during the 1990s. When compared with the middle school scene in Australia, England, and America, the New Zealand educational ministry appeared to be reticent about creating stand-alone middle schools. The establishment of seven state-funded middle schools — restricted composite schools<sup>3</sup> — during the 1990s was due to a unique balance having been achieved between political factors and pedagogical pressures. The establishment of these schools in seven local communities, rather than across the nation as part of governmental education policy may point to the reality that middle schools in the New Zealand education system were not universally accepted.

As chapter 5 explains, each New Zealand middle school developed in a different way, with political factors being more apparent in some cases (for example, St.

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3. The 1989 Education Act did not have a middle school definition. All schools other than primary, secondary, Form 1-7 colleges and Area schools were defined as being restricted composite schools

Andrews Middle School) than in others (i.e. Clover Park Middle School). However, a set of common issues faced by each middle school has been identified in this research. The importation of new educational theories and practices ensured that contemporary middle school research underpinned the pedagogical debate as it developed in New Zealand. These ideas — particularly from America through the NZIMSA Executive in the first instance, and then in the late 1990s by visits to America by New Zealand intermediate and middle school principals prompted further debate about the middle school philosophy and structure. While the USA research has been highly influential it does not necessarily hold all of the answers. Ongoing local research is essential to inform our particular socio-cultural milieu. The debate did not diminish because of the variety of vested interest groups involved, in particular the Post Primary Teachers Association and local primary schools seeking recapitation in order to maintain enrolments.

These national issues surrounded the fourth research dimension, the balance that had been achieved between competing political and pedagogical pressures during the 1990s as demonstrated in chapter 7. The political aspirations of the New Zealand First party as the coalition member of the National-led government (1996-1998) and in particular the stance adopted by the Associate Minister of Education, Brian Donnelly, ensured that fiscal and educational efficiency concerns were to the fore in discussions about school structures and restructuring. This meant substantial support for the establishment of middle schools for the first time since the 1920s. Congruence between the pedagogical aspirations of the middle school proponents and the political will of the government meant that middle schools could be established in communities where members were

sympathetic to this new schooling initiative, as had been intended under Lockwood Smith's Educational Development Initiatives, mooted first in 1991.

A further argument explored in this thesis is that the climate of educational "reform" that existed during the 1990s in New Zealand assisted the evolution of middle schools. The devolution of power from the Ministry of Education established the administrative processes and framework through which schools could pursue a self-managing philosophy and led to policies of parental choice of schools and to management of local school by boards of trustees. These new authorities, the legislation proposed, could develop a school structure that better suited the needs of the parents, students and the community in which they were situated. This decade of administrative change within education (1988-1998), followed by the election of a coalition government, consequently made it easier for middle schools to be established. As we have seen, their evolution depended on several factors, not least of which was the policy importation of pedagogical ideas from the international community.

Therefore, during the 1990s there was support from politicians and from recent changes to the way in which schools were administered (under the "Picot" system, which took effect from October 1, 1989). It seems reasonable to argue that further political and administrative support for middle schools will be needed if these institutions are to be set up on a national basis. Accordingly, the lack of support for these schools in the state sector since the election of a Labour-Alliance coalition government (1999- ) may suggest that the educational aims of the Labour coalition government and those of middle school proponents are not

aligned. Rather there is evidence to suggest that the present government's review of secondary education, proposed by the Minister of Education, Trevor Mallard, could have major implications for the establishment and maintenance of middle schools. The recommendations made by the review team will furnish interesting new research material. In the absence of the report it seems reasonable to pose several questions which have a direct bearing on middle schools. For example, will the development of middle schools on secondary school sites be suggested? If so, then, will they be "ring-fenced" institutions along the lines of those in the private colleges? Alternatively will new middle schools become part of the secondary school system, thereby signalling a return to the junior high school model with secondary school trained staff? Whatever arrangement is decided upon, it is likely that many new opportunities for continued research into the field of middle school development will remain.

The possibility that middle schools may function as "terminal" institutions also needs to be contemplated in the light of the number of students who do not remain at secondary school until their sixteenth year. Beeby (1984) referred to the terminal-preparatory distinction and argued that a serious educational conflict had long existed between terminal and preparatory programmes. The former were aimed at the tertiary education sector while the latter focussed on preparing youth for direct entry jobs.<sup>4</sup> A revisiting of the ideas of Beeby and Watson could help to stimulate greater interest in New Zealand middle schools. If there is indeed firm support for these schools then the practice of operating two separate schools — a "ring-fenced" middle school and a senior secondary school — on the same site

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4. Beeby, C.E. (1984). A problem of secondary education unsolved worldwide. In G. McDonald, & A. Campbell (Eds.) *Looking forward: Essays on the future of education in New Zealand*, pp. 89-111. Wellington: Te Aro Press.

may well be the most pragmatic solution to address the current schooling concerns of the Ministry of Education and the pedagogical concerns for our students. Factors such as steadily declining school rolls after 2005, and the aging of school property, plant and buildings that are proving to be costly to maintain, cannot be ignored by educators, principals, boards of trustees and Ministry of Education officials. To this end the model outlined above might best serve the many and varied communities and the demographic realities of New Zealand well into the twenty-first century. As Trevor Mallard, Minister of Education stated in a recent publication:

A balance needs to be found between the secure and supportive environment of a primary school and the intellectual variation and stimulation of secondary schooling, to meet the specific requirements of students in the middle.<sup>5</sup>

The fifth and final research dimension to the present study involved making some predictions about the future of the New Zealand middle school movement. It was argued that a clearly articulated middle school rationale, philosophy and structure is urgently needed so as to assure the survival and growth of state-funded, independent middle schools as part of the New Zealand primary service. In particular, debate over issues such as: the grade-span of middle school students, transition pathways to secondary school, recapitation of primary schools, and how to attain some kind of balance between exploration, specialization and vocational education need to be resolved both at a pedagogical and a political level.

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5. Mallard, T. (2004). *My preference is... New Zealand Intermediate Middle Schools Newsletter*. (Vol.2). Hamilton: NZAIMS, p.2.

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## **Appendix A: An interview with**

**DAVID CRICKMER  
PRINCIPAL OF BRUCE McLAREN SCHOOL**

B Hinchco: “So, if we can start just with your career in education um and if you could give me some background information?”

D Crickmer: “Ah, it is varied. What I’ve got to – because a lot of it is tied up with my background as well. Born in England, we went to Kenya at the age of five and stayed there until I was seventeen and I was very much the product of the Kenyan education system, which was very formal. Um, went back to England in ’61, training College ’63 to ’66 and then taught for three years before I came out for a two year working holiday in ’69 um,to Westport.

B Hinchco: “Um, what a cultural change.”

D Crickmer: “Well, Westport was very similar to the little town I grew up in Kenya so, um, it was like an old pair of shorts – it was very comfortable. The Lincolnshire system, which was 9 – 13 which was the age group I trained in when I was at Borough Road College in London, I specialised 9 – 13 year olds. So, um, I’ve always been interested in that ah middle block and, up till now, I’ve taught in Full Primaries and thoroughly enjoyed them. Coming to an Intermediate, I could really see the advantages for them and my biggest complaint about them is their being too short and I am fully in favour of expanding them either to capture standard fours or capture form three. I don’t know about the fourth form but um if they all went from form one to form four I would go with it.

What I have always been concerned about is developing into a war between Primary and Secondary and especially at a time when you’re so dependant on the number of children you have got in the school. It was when there was a move to have a middle school established in Henderson that I could see the repercussions coming very rapidly from the two local High Schools um one of with whom I have got very close, very close contacts that is Henderson High we work very closely together and the Principal at the time told me that if he had the middle school development capture form three and four they would be forced to go form one to seven which would lead to a head on clash and I am a great believer in cooperation in education rather than clashes.

So my basic belief is that if you are going to have middle schools it is no good going about it piecemeal it has got to be driven as a wish from the whole community

In the old days of the Education Boards you would probably have a lot more of a say if you were going to a middle schools besides from getting the secondary on

side I think it is even more important now to get everybody on side before you make the change as every school is a separate entity.

B.Hinchco. So we will unpack some of those issues.  
So a little bit about Bruce McLaren because this is the case study you are talking about isn't it, Bruce McLaren?

D Crickmer No this is not Bruce McLaren, we have never looked at going Middle school because of the local situation. We went to see the Ministry back in 1990.. 1991 and we were told that very clearly that they would oppose us changing to Middle school or at least capturing form threes. So we have never pushed this but the movement is from Henderson Intermediate and the Principal there is a very strong believer in Middle schools and I respect his views on that. It was the political implications that I was concerned with.

B.Hinchco Can you articulate some of those political implications?

D Crickmer Yes the um straight after Geoff announced that he was going to go ah become a Middle School I immediately fielded some phone calls indicating a very heavy backlash against it not only from um my local High School, Henderson High, um but also from Waitakere College which Geoff feeds into and also from the contributing schools that said that they were going to be a backlash onto them. They could see the if we lost our form ones and twos then we would probably go down to them and start catching the standard fours and that it would end up as a real fight as you had in Rotorua some years ago.

And I was on national executive at the time and I heard about the information that was coming out of Rotorua and this was the last thing we needed in West Auckland because we have always been a very closely-knit and unified ah group Principals' Association stretching back quite some years.

We had had a big fight when we had two schools recapitulating in our area and there were big shouting matches at meetings and how much more would it be if we went middle schooling. And um it would disrupt our organization and split the community

B.Hinchco So if we come back then to the philosophy of Middle Schooling as opposed to Middle Schools do you see value in the philosophy of Middle Schooling?

D Crickmer Middle Schooling as distinct from Junior High Schools? Yes ah I am a great believer in home rooms I am a great believer in a certain amount of specialisation but children of this age need their base in a classroom with someone they know and someone they can relate to. The reading writing specialist with the children moving around like a Junior High School in the States. No I do not believe in that type of middle schooling I call that a Junior High School and in my own mind I make that distinction between middle schooling and junior high schools.

B.Hinchco Can Intermediate schools with two years duration deliver middle schooling?

D.Crickmer Yes, I think they can and um I still call myself an intermediate school an intermediate school or a middle school of two years and I think we have got that philosophy of having a homeroom and at the same time some specialisation and we have got some specialists such as ICT, music and Art, but I would like to see a little more of the specialisation within the syndicates one person taking responsibility for the sport for example I would like to see a little bit more specialisation but not too much more as I still believe the main job is the classroom teacher.

B.Hinchco Could you just explain how Bruce McLaren is set up, syndicates, classroom teachers, specialisation?

D.Crickmer Okay you have got um five syndicates, we have three in form one two in form two and they range from three classrooms to four classrooms in each syndicate. One syndicate leader in charge with a management unit and um two teachers or three teachers or whatever. And all planning is done cooperatively um it is run by curriculum groups the main thrust of the whole school is upon written language, reading and maths because some children are coming here with a reading age way below seven. 46% of our children are reading below their chronological age too many cannot um write full sentences let alone paragraphs, let alone full stories, essays. They do not know the difference between full stops capital letters and we have to start back from scratch with them. So I use every other curriculum area with the exception of Technology and PE acts as a coat hanger purely for literacy and numeracy. We have been doing that for a few years now. ERO gave us a pat on the back for it, which was very pleasing.

So the curriculum groups work out the units they look at where they can put in the language. Take a social studies unit it is really a language unit with a few social studies objectives thrown in but we are really looking at carrying on at the moment with written language, reading and comprehension skills with the children, making them, with maths, the priority.

The curriculum groups prepare the units for the whole of the form year, seven or eight, we don't have integrated classes they are just straight year seven, year eight and we just stream out the independent learners in each area. And then the syndicate leaders get agreement on which achievement objectives they are going to concentrate upon and then the work is set from there. So I have tried to get it so that the teachers are not working in a vacuum they are working cooperatively together.

B.Hinchco So a lot of what you have just said are middle schooling ideas aren't they?

D.Crickmer Yes

B.Hinchco So continue with the story with Henderson Intermediate. Have they gone to middle school status?

D.Crickmer No they haven't. Um Once I found out that ah there was quite a backlash developing I thought the better thing to do was to get everyone together to have a discussion on what was proposed. W only heard of their proposal in the last week of the school term. There wasn't time to get together so I faxed everybody in the area where Geoff said the ones that were involved and we had a meeting at Waitakere College in the first week of the holidays and quite candidly I was very surprised at the amount of resentment against Geoff from his contributing schools. I didn't think they would have been as resentful as much as, I thought I would have a fight from the secondaries, which would need to be calmed down to see what we could do, but it was very ah anti from the contributing schools They said it was because they hadn't been consulted and they were feeling that it had been thrust upon them. So I had the meeting and it decided that the best thing to do was to let the Ministry know that we were opposed to the idea, which we did. And after that we did not have any more meetings.

That was our function, we got together so we could have a chance to find out what was going on, how we felt about it and I was one of the co-signers of the letter and it was.. I was happy to do it and it was my belief that to introduce a middle school in this way would have been very detrimental to the political structure of the day, the educational political structure.

B. Hinchco Were there articulated at that meeting or any other meeting ah other sound arguments against middle schooling, other than the political close working relationships you already had?

D.Crickmer It was a year or so ago now but I can't remember any

B.Hinchco So that was the basis of it

D Crickmer It was the basis It was political you take our form threes we're going after your form ones and twos it was as clear cut as that. It was a very honest meeting.

B.Hinchco As a Principal of an Intermediate School do you think your children when they move onto the High Schools, plural, get a good deal?

D.Crickmer I've seen a lot of kids, with whom we have done a lot of work, floundering at secondary school. I believe the smaller secondary schools have the better pastoral care. One school where they really nurture them is Henderson High, small about 500 so its small enough so that they know their children and the Principal down there and the two D.P's when we get together we all have the same beliefs and views about children. We've even talked about forming a joint campus together, but that is just talk at the moment. Realistically Owen and I would very much like

to see far more movement between form two's and form three's coming to this school and the form twos going to that school as the individual need arises and we might even get that going yet, we are still talking about it.

B.Hinchco     Do you feel comfortable telling me a little more about that?

D.Crickmer    Um Oh yes its um I've been. Its an idea which I floated a while ago in my cluster here whereby you have fluidity between schools, Now this is back in 1990, before Lockwood Smith came out and said all zoning is abolished and we were looking at ways of extending our bright kids and helping the slow kids and a little bit of movement between schools, children coming to Bruce McLaren to be extended in this area, children needing some remedial work going, for example, to Henderson Valley, we were just toying with ideas of looking at us as a cluster, if you like an educational scheme together and seeing what we could do for the better for our kids. Shortly after that came the ah the big announcement that you could go to any school they like which killed the idea dead in the water. We also had extension classes going to the local intermediates, we bussed children to Rangeview, children came from Glen Eden to here, um other children went to Henderson Intermediate, Kelston and so on. Since zoning was abolished that has been killed dead in the water again

We lost a lot of cooperation, we had some good initiatives going, I don't thank Lockwood Smith for that

B.Hinchco     Would you say that you were of the first clusters of schools to be working in that sort of collegial way?

D. Crickmer    We were, we still are pretty collegial um I haven't seen any move back towards that exchange yet, but we haven't got any zones here. Henderson have, Rangeview have, Glen Eden have, Te Atatu hasn't and I don't think Kelston have. Um The time will come very shortly when I will need to have a zone. And when that does then I think we can start looking at each other and saying okay Its time to start up the exchange again.

B. Hinchco    You are indicating that that would require a political move, or is it a personality, is it a Principals initiative or is it a combination of both of the two?

D. Crickner    Yes it was a Principals initiative to begin with then the politics came in naturally like you want to attract as many children to your school and I think the feeling is that if you are producing something at your school parents might perceive that as being slightly more attractive than if you were sending your students to other schools. So you are always looking over your shoulder at what the parents think.

B.Hinchco     You also talked earlier of the two schools who were considering recapitation?

D.Crickmer Ah Birdwood and Glen Avon. Birdwood contributed to Henderson Intermediate um decile 1,decile 2 very low decile by the way with lots of problems and they went that way um they very much largely recapitated. Some children still went onto Henderson and they kept all the roughies back, so we believed that it would collapse after a while, and the same thing happened at Glen Avon which contributed to Blockhouse Bay Intermediate. But in actual fact they both have succeeded, Glen Avon is one of the most popular, catering for a specific group.

Birdwood worked out very well just like Glen Avon and um I probably set a cat amongst the pigeons to some extent but I opened up Henderson's Technology Center for their children to have um ah Technology. It's ah, I think my peers were a bit disappointed with me in that probably bloody annoyed really but I had the space in the Henderson Technology Center which is attached to Bruce McLaren and I couldn't leave them, they were colleagues too and anyway our kids benefited us because we could keep our teacher so once again politics came into it again. And it worked out quite well and I don't think Blockhouse Bay suffered from it and I don't think Henderson has, either.

If there were any more recapitations then there would be real problems I think because it would increase competition oh and we had Green Bay ah recapitate as well, which affect Glen Eden and Blockhouse Bay.

B.Hinchco Looking nationally at the Middle School movement, you have been on the national executive, do you see a way forward for the Middle School movement?

D. Crickmer Just lately Yes ah. At the breakfast meeting we had with our local cluster, Geoff, President of Auckland Intermediate Principals was saying that there was more and more of a movement for the secondaries to give away ah the third and fourth forms as they are concentrating on this NCEA business. So that happens um you are going to get a political um realisation that yes it might be better to let secondaries concentrate on their main task in that case who is going to pick up year 9 and 10, Intermediates will put up their hands.

If that comes about, I think it would be the best thing of the lot.

B.Hinchco So the advantages you see to that happening nationally would be?

D. Crickmer I would then see Middle Schools being established on a proper footing, a proper coding, um proper staffing, greater admission of some of the new property developments that have begun to be talked about middle schools getting, third and fourth formers, year nine and ten property allowances which can make big differences which before were just being ignored and the schools left to fend for themselves.

So I think there is a gradual movement coming in but we are going to need some Minister um with testicular fortitude to be able to say "Okay this is what's going

to happen." And then I think you the best situation to get Middle Schools going. The Intermediates would be four years, guidance counsellors, and the other props you would need especially for the um for the fourth formers.

B.Hinchco But you are in the rare situation that you are one of the few Principals who have had ah your teacher training in year nine to thirteen... From that training some ideas that have come through, you are aware of the English situation?

D.Crickmer Oh it has been so long since I left England Brian, you know '69 um my mates who went through training college with me have come out and seen me they have now retired, they were offered early retirement and they took it and they have a teacher shortage um so what is happening over there I have no idea now.

But I do know that I was teaching in a secondary modern for a little while, just for a few weeks, but putting eleven year olds in there, no way. That is why I am rather pleased to see children kept in the Primary service here, for those extra two years.

## **Appendix B: An Interview With**

### **JOHN CRONE PRINCIPAL OF BERKLEY NORMAL MIDDLE SCHOOL**

**B Hinchco:** “So, to start off with, if you could just give a brief outline of your career to date, um, particularly, ah, concerning, um, education at Intermediate Schools”

**J Crone:** “Well, I’m in my thirty-seventh year of teaching, ah, and I was educated at Palmerston North Teachers’ College, returned to my home, to Turangawaewae, Taranaki, to do my initial teaching, which was four years in small country schools, returned to Palmerston North, the reason for that being is that we never had the opportunity to study at University when qualifying or training - to be teachers and the Extra Mural Programme never appealed, so I went back to the, a University town and did part-time University studies and, um, and six years, got an Honours Degree. Ah, and during that time, I was domiciled in an Intermediate, Normal Intermediate at Palmerston North, ah, moved within it to the Special Education for six years, ah, socially mostly mal-adjusted children, so I was touched again by the students who have never fitted any system and, um, saw the advantages of, ah, having a entrepreneurial Principal, who gave me licence to create an environment which, in the end, formed the basis of my Middle School approach.

Ah, then, ah, at a relatively early age, I got, ah, a very, a top yellow and couldn’t use it – I tried to, and each time lost it to years of service. So, in my frustration, went to the University and I had eight years at Massey University lecturing in Education, with a particular interest in curriculum issues, and mathematics. And then, um, when I thought I was experienced enough and had enough service, then started applying for Principalships and I won a position at, um, Katikati Primary School, which was, in those days, a G5 Grade Primary School. I had five terms there in three term year format.

During that time, had a School Inspection by the, the old Inspectorate, um, the school had a history of, ah, of, um, what you might call, malaise, and, um, what they saw when they came was, ah, impressive enough to get them to encourage me to apply for Berkley Normal Middle School.

So, I never finished what I started at Katikati. I was flattered by that approach, responded to it in an affirmative way, and it’s all history from there. I’ve been sixteen years at Berkley Normal Intermediate/Berkley Normal Middle School.”

**B Hinchco:** “So, tell us a little bit about Berkley – how the community, prior to becoming a Middle School – the sort of community you were servicing?”

J Crone: "Well, Berkley, um, is a Decile 10 environment, um, it's a community that places high value on education. The industry of this corner of the town is, is learning. The University, the, ah, Ruakura and, um, the two root breeding, um, communities in this – I mean by that, um, animal breeding communities, artificial insemination. Um, many of the parents who live close to their work also are parents of our community. So there would be a very high proportion of parents who are University Graduates. So, to begin with, I don't have to convince the community of the value of education.

Um, as a result of that, there are some relatively liberal-minded people within the community but, at the same time, a very good core of conservatives because they've done a lot in the old system, they're winners and, as a, as a consequence, they don't want too much change because they can see their children working through the same system and scoring, ah, the same, the same level of, ah, achievement.

Um, the community is shrinking in the sense that house prices are going up, um, that maintains the Decile 10 type nature of people buying in. So, at the same time, ah, the University is creeping towards us and a lot of, um, the houses that once produced families have now become rentals. Ah, and so we have had a decline in our Roll. Ah, we're 20%, 28% rural, ah, which means that students come to our school by bus from out of town, but most of those are, are ten and five acres blocks, hectare block homesteads, ah, and again, they tend to be small families and second or third home owners. Um, so therefore they're coming from a mature base and also a base where the income earners have either achieved or are achieving at the highest level within their profession and, again, is very competitive.

Um, and so this community expects a lot of all of the schools. The seven-eights of the students who come to our school have been in a six year Normal School contributing environment, ah, and so therefore they have been part of pre-service education, ah, with all the busyness that, that goes with that. And so, therefore, our students think nothing about having people observe them, walk through the school, or whatever.

The kids are basically very nice, very...it was a community dominated by European Pakeha. Um, when I came to school there was 2% Maori in the school. Um, one of our contributing schools only has 1 Maori in it, which gives you some indication of how they are also Decile 10 in environment. So, in the last four, five years, things have changed for us and we are now 16% Maori, and it's no accident that the Middle School and the increase in Maori, I think, come together because the concept of three year's nurturing, um, working hard for the students, are, in particular, the Maori students, has appealed, and they are the ones that disproportionately choose to stay on at Year 9 in a very European environment, so it's a very interesting trend."

B Hinchco: “So the change from Intermediate to Middle would have required quite a bit of thinking on your part. Were there certain strengths of the Intermediate system or certain weaknesses of the Intermediate system that led you towards the change to Middle School?”

J Crone: “I can take you back further than that. I always wanted to be Principal of a Middle School before I ever became a Principal. So rising to Berkley – that wasn’t a catalyst. I was already convinced of that, and when I did my Honours, ah, papers, I chose Middle School education in the early ’70’s, mid-’70’s, and so I’d read about it and I’ve had an experience of going to the States in ’78 to have a look at them, and although I didn’t like the Junior High School concept the States had at that stage, I enjoyed the way in which there seemed to be a natural break in, ah, into the three schooling situations. And so I always held close to my heart that, one day, one day, I might start my own school up and, and create a situation based on what I thought was a good mix, and it would have been creating a genuine Middle School environment.

“Tomorrow’s Schools” presented itself with a great opportunity, and I left my timing to when there, the political environment encouraged me to do so in National, especially under Creech, but perhaps under Lockwood too. Talking about seamless education seemed to be the appropriate time to do it. So, this community didn’t decide it wanted a Middle School all by itself – it was led to it – I make no, I make no apology for that – but I had to convince them that it was a good move and, um, I had them convinced in ’91, but it was a tragedy on our boundary with the loss of John Leech, the Hillcrest High School Principal, who had a lot of mana in this community. His, his tragic death got us pulled back from that and we waited for the community to grieve, ah, to go through that process, and it was four years later before Board and I brought it back to the surface again.

But we have had reasonably extensive consultation – extensive in relation to how it would have viewed in the early ’90’s, not how little it would be viewed today, and we had public meetings on it and that, ah, John Leech and myself, the two major players that would be affected, had been in dialogue for some months about it and, um, I had the support his understanding of it, ah, and, um, it would have been interesting to see that if he had lived whether, whether in fact, ah, we would have made it work in the early ’90’s and whether we would have got passed the problems that I’ve encountered since. So, at that time, it was philosophically based within the same, same context and we were, in those, days also sharing staff, so the level of co-operation suggested that I think we’d have worked it through, um, and that, ah, what we’re doing today would be even further advanced.”

B Hinchco: “So, can you articulate your philosophy of Middle School education?”

J Crone: “Yeah, um, I, I, ah, I, I come from a platform first and foremost that the individual’s needs are, ah, ah, imperative and that skilful teachers, given the right

sort of teaching environment, can get pretty close to accommodating individual needs. The individual needs doesn't mean that there is something for every child specific, but it's something where every individual is well known about and that once its, once a teacher knows about the needs of a student, it's a very, um, misplaced teacher that doesn't in some way respond to that.

Ah, and that that sort of philosophy, um, transcends all levels of education and that I was certainly disappointed from my own growing up experience and a number of my other colleagues and subsequent people that I came in contact with again when I was a Lecturer at University and saw the by-product of a system just below me in terms of they'd lost their passion - that they'd been high achievers in terms of being through the sieve, but they weren't educated — that they could regurgitate but their level of skill was, was, ah, to say the least abysmal.

And, and, and so therefore obviously our educational system had desensified, in my view, not been tailor-made to grow the individual to the, to their truest potential as a whole person. And so, I guess the constructivist theory approach to learning was where I was deeply rooted and that, um, 13 and 14 year olds were cut off from that philosophy abruptly by going into a schooling system where everything was pre-determined, a Timetable was already put in place and only fitting was the individual to the Timetable and to the predetermined curriculum, not the other way round, and so therefore creating, creating a learning situation which was specifically focused on the, um, emerging adolescent, I thought, was very appropriate.

Now that the family is less influential across-the-board in shaping of the parent versus the citizenship, the Church has become almost non-existent in the lives of students so that the spiritual dimension has gone as well and that, um, the world is, having got onto a quite a, what you call a right wing philosophy where everything is driven by profit, ah, the speed of it was increasing and the, the, the philosophy seemed to be "it's alright as long as you don't get caught" total morality aspect also, so I was always a strong Colburg-type man when you looked at the statements of moral development, for example. And this schools, effective schools, need to know that there were, there were just, there was a sequence in moral development like there was in intellectual development, and so on and so forth.

So that to have, to have a, have a learning environment that actually cognized all that, looked at the true ecological balance and the way in which all that came together so therefore you're looking at the whole, and at the end point was the growth of the individual rather than the passing of exams was something that, that I had not seen around, and I didn't see, I didn't, I didn't see that there weren't people committed to those sorts of ideals, but the structures got in the road of people being able to actually work at getting it to, getting it to happen. Um, I saw most Principals being good Principals in the sense of administration, but not entrepreneurial. Um, that was the one thing I was disappointed in in the

profession that I was proud of, was that the entrepreneurialship of it was lacking and that we seem to reward conservatism.

Um, so I knew the Middle School was going to be something that, that would be viewed as entrepreneurial but, in terms of world-wide scene, I didn't see that entrepreneurial, and it meant that also there would be lots of people that had to be, worked through it slowly. And so when we did the Middle School, the group that, that supported it the most on the ground, and the facts and figures that were showed to the Minister in terms of levels of support in that community were people that were maybe four years out from being in a Middle School in other words they had children at school that were at Year 2 and 3 and were still in that very developmental stage and weren't looking at that product, but were looking at the process, were looking at environment and environmental features in terms of eduction, and wanted very much to keep their children in a child-focused environment as opposed to one that was trying to fit the body of the child, intellectually, into the environment of the adult sooner than they ought.

So, my philosophy, um, it's a long way to answer the question, but my philosophy is very much one, um, of focusing on individual needs, um, that goes also for staff, so that, that the environment applies to everybody in it and so the way in which you can handle staff, nurture them and give them space – our, our philosophy is all about being a self-directed person, self-directed learner, ah, we, where you get past the stages of discipline and self-discipline and getting self-directedness, so that you have some vision about where you want to be and where you want to go or who you want to be and that you know that you actually have some control over that – that, that, that you are in control – that you don't say, "Well, what's the use, it's all around me but I can't do anything about it. The, the, the approach is that you can, you make a difference – it's your approach, your, your attitude. And it's having a staff or a school which is focused in the same way creates an environment where everything is possible. And, every day, ah, in the Staffroom, I'm amazed at the amount of experienced teacher talk that keeps on saying our, our way where there's just been a recent discovery. It's what they've seen from students, and yet they may be 20, 30 years' experience they still see freshness a brightness. And why do they see it? Because their eyes are open to the individuals – they're not open to the mean, median and mode – they're not open to how young LCA Standards or bitching – it does not a political forum. It's all about "Keep that out of my life – if you can deal with that, we'll support you, but give us some space to actually attend to the needs of our students. The passions for which it's still a vocation, and if children are taught by teachers who have that vocational feel for their job as opposed to "Oh, well, two years and I'm Certificated – I've got a meal ticket to Britain and away I go" etc, etc, then I still think we're doing pretty well by structures in terms of what provides most effectively to teach effectively, um, a socialising agent and platform for ever.

Schools are, to me, ah, the greatest agent of transfer of our, of the culture we want them on our consistencies.”

B Hinchco: “So, during the '70's, '80's and early '90's when you formulating your philosophy of Middle Schools, and much of the material you had been reading had been of a Junior High School nature of North America, possibly some Middle School which England in the '70's, what were the greatest influences, or what were some of the greatest influences on your thinking?”

J Crone: “One person, really, and, and it, and it wasn't the person who was tied to any particular school and structure, but he was a Principal of mine who, who came from um, ah, Scandinavian country and he, he immigrated to New Zealand after World War II, early '50's, um, and with him he bought, ah, a sensitivity to life which most New Zealand leaders didn't have and, um, he was a person who had little language when he arrived, and yet when I came in contact with him, he could speak English and speak Maori fluently.

He was a person who embraced the sort of things we'd been talking about in terms of nothing was impossible. Ah, but, but he, he was also, um, prepared to, ah, be his own person and stand out in the crowd and was heavily criticised by the, the, ah, rugby/racing/beer mentality. Um, but he showed me just how important it is for us to value the differences in people, and that transferred across the system as well, and there was a sameness in New Zealand which told me that the panacea had been found, and why was - own environment where nothing new was happening, then obviously the environment says that we've got it, we feel comfortable with it. He was the sort of person that challenged that.

And he challenged that within the structures to start with, but he gave me the energy and the, ah, you might say foresight to say “Well, he's doing that now within structures – if I can build on that and put the additional energy into it, I may change the structures.” And that's why I shared with you earlier that I'd always thought that, in the end, that I could set up my own school, that I would make a living. I would privatise it. I always thought that you and I would own our own schools and that would, that, that's the way in which schooling could break the traditional mould and, and the difference would be what I am sharing with you now. It would be like that. I even thought of the plan and how I'd get going and how I'd finance it and the staff that I'd bring to it and, um, so all the time I taught students at College I always noticed an exceptional student or two that I would tap on the shoulder if I ever put that school together. I, I had about thirty staff that I think would have given it a magnificent balance to it too to get it started. And I've kept in touch with them in the sense of where they were and what they were doing. I never had to touch that, that resource but, nevertheless, it's just, just part of the preparedness if, if the opportunity came for private enterprise. And I had a site in the Bay of Plenty and Katikati area that could have been easily turned to it it became a cool store. I could have done it!”

B Hinchco: "So, are Middle Schools about structure, or is about Middle Schooling?"

J Crone: "Well, you see, people say "What's the difference between an Intermediate and a Middle School?" and I would say, um "Nothing, if it's run right.. if the philosophy of the leader is similar, it's just how long you've got to work with." And then we have the argument about and, and one in Richard Ward, for example, ah, criticised me when we went to Middle School - he said that we weren't a Middle School, which I thought was, for an intellectual, quite a shallow statement at the time, and I've told Richard that so I don't mind it being on tape.

And, and we actually, well I didn't engage in it in the paper - I allowed him to make the statement and, and then had to just put it right in my community. But he maintained that Middle Schools were four years institutions and that because he was doing his research at St Andrews, he thought that I'd sold the Middle School concept down the drain.

I'm saying Middle School is, is, is – you've got to know what you, what, what it is that you want to work with and how far you want to take it. And, and it's different between one community and another. We already had an outstanding resource in our local High School that was meeting the needs and aspirations of our community, and, and, and so therefore when we provided an alternative, um, we were fitting in and we were looking at what we did best – not what we could do better than them. And, and, ah, and so I didn't want to change the culture of the school, um, to the extent where I felt the pressures of an external examination system for example, so the private assessment. I wanted it to be 70-80% formative. Some of it's important to look at schoolwide – what effect and treatment – things like that, and for credentialling as well and to keep your, keep your contact with reality. But, but most of it I wanted it to be about finding out about where we're at, what we're doing for have some input in the loop into the pedagogy, the refinement, the way in which we're resourced, self-reflection, self-review, self-appraisal, um, and so on and so forth.

And so, um, we, we looked at three years because, um, I wanted a beginning, a middle and an end. Um, the, the, the Intermediate system the groups are either coming or going – there is no middle and, under the new climate, we've already been through six weeks of schools flooding us with Prospectuses, Scholarships and enrolments, and that's the Year 8 group, and they've just become a Year 8.

With our, with our school now, um, though I, I shield them from that – I say we provide Year 9, so therefore fit into a system where, um, I'm not giving that out until later in the year – allow them to actually be a little more mature so they can begin to make some decisions of their own, or at least have an input into it. And that, at the same time, we'll have a chance to present our stuff too because we are part of that choice factor.

Um, also wanted to have it so that, so that it seems to be our current society that there's a big difference between a 14 year old and 15 year old. As you and I know, the greatest crisis when we went to – one of the greatest crises – when we went to American in '96 was, um, what do you with 14 and 15 year olds? The schooling system they were looking at reorganising the 3 and 4 Year rather than 4 and 3, so that the 14 year olds are in one school and the 15 year olds are in the other. There was a challenge of American youth and setting a high this becoming a place, you know, um, ah, either two or three year type thing, which made me think about also re-visiting where you put the line in terms of the cut off point. I don't want any child in our school to think that they can get a Driver's Licence while they're at school. I don't want any child in, in, in our school to actually say "I'm within a few months of being able to – be cool 16 – and therefore I'll just speed up because I look more mature" and to bring those, those pressures back into the school.

There is a buffer, a nice natural buffer at the moment between the child, the child who stays here and wants to stay a child, and the other one who, who can't wait to be in the next stage and, and so as a consequence of that, um, the school is working within what you call the 'natural rhythms' of the community's growth patterns, as opposed to being slightly a misfit in, ah, and, um, our, our, our young 9 Year students who go, who leave us, go with great deal of self-assurance and confidence and, and they have basically said "We don't do drugs, we don't need to worry about hopping into bed with someone. We, we, we don't mind being different to the kid next door because I don't believe that silly – I can see the, see the working system of pursueing vandalism or whatever.

Ah, whereas the kids that they were with the year before have been wooed and dragged into a far bigger socio, ah, sociological group, and we all have our weaknesses and, and one being wanting to belong and, um, belonging to what? Well, a lot of those groups are groups that are not really in schools – the school's function - but they are there for social and serving out their time at school – they can escape the formal expectations of, of New Zealand society.

And so therefore, um, I've seen good – I've seen great, great people in recent times who, who we wanted to have stay and, in the end, they still wanted to stay but their parents said "No, you must go on because that's, that's the traditional route." They're lost, they lose, they lose some very important years in their growing up, either through pregnancies, through drug overdose, through being kicked out of school, um, being still in school but performing well below their level of capability, ah, being an all-rounder who would want to get into everything in life and then getting into nothing but booze and alcohol and fast cars and, in our community, there's plenty of those fast cars around because there's no shortage of money. Um, parents are quite happy to have their children, um, basically "happy" by giving them material things, but not giving them the time which helps, helps the, um, the family values be passed on.

Um, we have quite a dysfunctional element in our, in our community – high rate of crime, high rate of vandalism – and they're good people, but they're just looking for – they wanted to be noticed. They, they they're doing things that do get attention. Like they don't mind what attention as long as that in the end someone is actually- they don't want to get caught but they know that the attention is there, someone's chasing the, the, ah, elusive act.

So the Middle School fits nicely in, in, in the three years into that. Um, we engage in inter-school activities with our two neighbours who are Year, Years, um, 1 to 4 and 7 to 10, and the difference between our school and theirs – I know the difference is there because we're Decile 10 and one's a Decile 7, another one's a Decile 5 – but I'm not – I'm taking that out of the equation – just the respect, the way in which they are proud of their school and the way in which they fit, um, the way in which they interact and, and, and, um, work with their, their teachers, um, the way in which we can attract staff – staff all come to the schools where they think that the respect is there and the student will still allow them to be in Primary School type control. Ah, and, ah, that's an important part of, of, you know, any successful school – it's who you attract – the staffing component. So it seemed to be nice and the people matter in making the choice to stay in a number of categories. One of the major categories is, is that their children make great starts to school but as parents, in the early days, they thought they were being good parents if they could accelerate their children through the schooling system. Many of them came to school reading or they made a great start in the first eighteen months, and therefore more than a year ahead of themselves. And, now, all of a sudden, they're saying "Hell, my child is only a – just turned 12 – and going to High School and that's school got 1,500 of them. And now when I know about the bullying, and the, the impersonalisation, and so on and so forth. And my child's just starting to bud – just starting to menstruate. There are so many other things I'd like them to be able to come to terms with that and have a peer group that's less conspicuous to them in terms of, ah, breaking them into the next, next phase.

And so, um, we're getting the intelligent child making the choice now, not the one who's not performing. And we have an Accelerate Class and, um, a sixth of that class stayed, stayed, ah, as Year 9 this year, which is quite a, quite a shift – quite a shift – and, as a result of that, it stretches, stretches us, challenges us to provide programmes that are, there are programmes for kids who, who are quite capable to perform at Year 10, Year 11 – they want to that, ah, and we get criticised from the local High School when they say "But if you teach them and let them do those things, they'll only do it again next year anyway." We're not consciously doing this – we're learner focussed, we're allowing the learner, at this stage, because they're at that level of achievement, to actually, ah, start investing in their own curriculum. We know the skill and level of Mathematics that now has to be done, but we have some great, ah, intellectual sessions that sometimes be, beginning to touch on reasonably high statistical analysis and, and, ah, the beginnings of

Calculus. Ah, they don't realise that but I, as a Mathematician, know that they're not far away. They could, they could, they could bowl over a School C paper – ex School C paper – and get B passes now, and yet they'll go to High School and get only a B+ pass after they've had two more years of "added value." How, how the High Schools doesn't evaluate what they've said and make something appropriate according to that they put them into it, then puff their chests out and say "Well, we got, we, we got ten 1's available at Sixth Form Certificate.

Ah, these kids are a commodity and they make, ah, a pool, and we know the game from there, and that, that High School then attracts a number of Out-of-Zone students who will all come in hoping that they'll, can grab some of those, those ones that were generated by different population, and so it goes on.

That's all within the philosophy I know. We, we, ah, we are more focused on the, the whole development of the individual."

B Hinchco: "So, you mentioned earlier, um, about the changing Maori population in the school and, and eluded the possibility that also has an influence on the Middle School structure."

J Crone: "Maori like it. Um, the evidence is, is, is that we've increased and it's the only variable that's changed – same price of houses and things like that. Um, we've got less, we've got less students, in one sense, in our community, but our School Roll is still the same, so we've got people travelling in a long way and Maori is part of that. Maori is travelling to past schools – it's not just middle class Europeans that's doing it. Ah, and um, our Year 9 class has got 28% Maori classes. So, you know, that, that, that puts it normally at 28% Maori school with a Decile 4,5,6,school. So, um, there are a whole lot of interesting variables in there which defy the, the, the National trends. But when I talk to students, one of the most overriding factors is they feel comfortable and feel respected. So when people talk about cultural safety and this is not a Maori school, I just ask them to ask the students who call themselves Maori and they define it rather than the academics the, the cliché definitions that we, we hear from Maori themselves – they are, they are trying to move things forward, or from Ministry Returns"

B Hinchco: "So why do you think Middle School may appeal to Maori?"

J Crone: "Well, this school in particular, it gives them an opportunity to, to tell, tell us what they would like, and there is room for you to ask that question and therefore the context in which you, which you develop the skills or, or promote the curriculum agendas is all important. And so, when I ask the kids a question about "What would you like?", I'm actually getting from that the context in which they'd like to learn in. And so I've shaped the curriculum every year, I've shaped the Timetable each year – it's never been the same any year in a row – but tell me how often a High School's Timetable is changed markedly to meet the needs of its client. Um, and at the same time, as we mature and grow, I'm trying to give

students a bigger say in their whole school environment, and some Year 9 groups get more of that than others – it depends again on where they're at and where they grow to.

Um, but Maori, Maori like that - it's a non-violent, non-physical environment. Um, a lot of Maori fall out of sporting teams and things like that when they leave the Primary setting. Um, a lot of these kids are good sports people. Um, a lot of them don't have wealthy backgrounds, but the families are spenders so they'll, they'll provide money, if they can, for the things their kids want. I'm finding these kids actually stay in sport, and yet we can't provide the Saturday sport for them because we're too small in number. But we have, um, alliances with other schools and we, we get them and, as a result of that, we actually feed them in on a one-to-one basis so the kids feel just by way in which the contact's made – that what's been happening in school happens for them outside school sport. And, ah, and our local High School is the only High School who won't interact with us – all the rest are happy to take kids into their teams. And, ah, when those teams beat our local High School, there's a, there's a, there's a small, wry smile on my face to see it. It's not coming from us it's just a feeling I have.

There are lots of kids who come back and say, after two or three months at High School "I wish, I wished I'd stayed." That makes the kids who stay feel better."

B Hinchco: "So, there are still issues, ah, issues with relationships and the local High School, ah, you're working through the issues, but are there issues of a nature that undermine what Middle schooling is all about?"

J Crone: "Oh, without a doubt. Um, until the leadership changes, I don't think that issue is going to go away go away. The legislation, if the legislation had not changed we wouldn't be a Middle School now, 'cause the school was winning – we'd got down to eleven students and, um, it was because the students had chose to stay with us – not one could go onto the local High School. So, parents, parents had to make a choice – if they wanted their child to go to a school, then you had to go when everyone else did. Now they have a genuine choice, and we are now forty-five – in two years, it's a huge increase. Um, but now they've got subtle, other subtle ways of doing it. Um, we're an irritant, we're an organisational inconvenience – they've got, they're full to overflowing, so we could be seen to be helping if they had the right approach to things. Um, what they did last year was they allowed all our students going through and there were twenty-seven of them at that school to stay as a Homeroom. So those kids felt really good in terms of support and they felt good about themselves. But, then the High School then refused to give them all the options that they chose, saying that they could only have the options where the vacancies were. Now that com... that's come back through the community and the community is saying "Well, yes we can get in now but our kids don't get what – don't get the real choice like the others do. We want them to have the real choice so they really have got to go to Year 9."

So, there still subtle ways in which the school is, is influencing parental choice. Um, there are some parents who say "I couldn't give a hoot! Ah, ah, that's, that's a good reason why I should go to another school." And, and therefore the local High School is getting less of our students now by, ah, because the community is starting to see the school for what, what it appears to be. It's a good school, but it just will not, it will not acknowledge this sort of thing. We're only small and we'll never be large and we never, we always provided an alternative route – we didn't provide the only route and, therefore, we were never going to make a big dent on it. And when you have a school that's full to overflowing and they have an Enrolment Policy and a Waiting List of 400+, I don't see the numbers game problem either.

But, yes, it's disappointing, but then I, throughout my educational life, have seen, ah, these things, moreso since "Tomorrow's Schools" came around than ever before, um, and it disappoints me because it, it's about being bigger than the, be, being bigger than the, the challenge – knowing why you're here – it's all about learning and kids, it's not about, ah, being bigger and better than the person next door - it's being different."

B Hinchco: "So it's not about leaving behind the Intermediate structure – it's a deeper philosophy possibly about working with the children?"

J Crone: "It's, it's, it's a philosophy that's based upon the school being geared so that it, that it actually sees the person – that the person doesn't catch up in statistical or, or an organisational curtains and that, I don't think, um, there a very few teachers who, who can turn their back on something that they actually see and, if they don't respond to it, then they're actually hurts or, or hinders the development of the individual. I'm talking about the, the teachers in the job because they like children. It's a very, it's easy to teach, ah, as a creative curriculum – it's easy, it's easy to, to resource because it's just continuity of what's been going before. Um, it's not appreciably different than the five year old's experience in terms of, just in terms of, um, degree, really."

B Hinchco: "But can it be transferred Nationwide?"

J Crone: "Of course it can. Of course it can. And, and, and, and it's not the economic, ah, economically it's not too expensive and politically, um, I think that's the problem. Ah, we have Unions that stand in the road of it – definitely Unions don't stand for children, they stand for, for workers and it's a shame, because education stands for children. Um, that's one thing. The second thing is, is that, um, political, political expediency won't, a Government won't do something unless it enhances its prospects of staying especially in the MMP environment and coalitions, ah, and so that – they are the things that stop, stop this from exploding. We, we've got, we've got naturally now a democratic bulge where High Schools are going to be full to over flowing and there are going to be Intermediates, for example, who are going to be in shrinking roles. It would be very easy, in some areas, for them

to keep their entire Year 9 group and allow the High School to accommodate the bulge and to not build an extra building but just perhaps do some modification, so that we could, we could work our way through where we're at at this point in time.

But that won't happen. They'll build bigger High Schools – they're talking about making the one down here two storey and things like that. And yet, if the community – well, this is what, what the community said – "If someone would make a decision that you were going to be a three year school, so that all the students stayed there, we would be really happy." It's what troubles us is, is that only some do and some don't, and we don't whether we are the some who should stay or the some that should go, and they feel very uneasy about it, and they get – they feel even more uneasy about it when the local High School responds the way it does. And when it makes comments, informally, that says that the children who come on from Berkley don't do as well, or aren't well prepared – and those comments – I mean, you could have guessed it before it even started – and it hasn't disappointed me – it's, it's, it's, it's said, it's said around. Um, get in the road of a, of a very good – and so this community is so lucky that it actually has this option. But, but I don't see this community actually celebrating that. I really don't. And, and that's, that's sad because we're far from what you call, ah, in granite – established – that, um, the change in political – just a minor change – see, the enrolment thing – ah, could put us back exactly where we were two years ago and, in the interim, we haven't moved on in terms of the relationship between the two schools. That the, that the school with the greatest power continues to be the High School, of all the schools – people see that's where the real work is done – that's where the real results are obtained.

Um, I got a PAT Profile, um, that I looked at and examined of Seventh Form success and Sixth Form success and, apart from, um, one or two individuals, the PAT Profile five years previous, hadn't changed one bit in terms of those who passed and those who got, um, A Bursaries and those who got B Bursaries were all representative in the proximity of my population hadn't changed.

So, what we'd done is we'd, we'd kept the momentum going instead and that, in itself, um, presents an interesting, ah, forum for debate – Why is that the case? – because there are different, different, different people coming on stream, so to speak, in terms of the grade patterns and, you know, the ability to function in an effectual way and stuff at different levels of motivation, but I think mediocracy is being rewarded in those schools staying in the same pattern, order. And, of course, the University system is, is a perfect example of rewarding, not excellence, A's, B's and C's. I've been in the system too long to see the, the, the carriage of injustice of, ah, the establishment there – the F system and the political system and knowing that my job's on the line if I don't get 'x' amount through and that's the reality of it, you know, and, and the Post-Graduate work is, is – the Post-Graduate triangle – but they have a very broad base and if they fail too many too early, then I cut my nose off to spite my face. And the, the kudos of

any Department is the number of Doctoral students that you've got, so for every Doctoral student there is more than a thousand plus people that that has to be in the system, so if you reduce that to 500, then the Doctoral student comes round once in every two years rather than every year, and so it goes on.

If that's the politics even in that, we're free of it. The Middle School is actually free of that we actually escape it. I know that, I know that they have to be touched by it eventually but hell I would like the individuals to be in power to, to be a greater participant in his own decision-making – we're talking about pathways – and, ah, that for the NCEA. I'm really encouraged by the philosophy of it, but it's important that the student actually has the skill for choice – actually has some vision – they've actually been a goal-setter, they can actually begin to look ahead and see, well, if I do this, then that is a possibility, or if I do this, this and this then I don't have to make a choice until I'm 16 or 17 because these will provide me with a broad base, or whatever. And, and that, to me, excites me – that's an aspect of being a self-directed person. And intellectual part of youth the way you live your life reality – do unto others as you would do unto yourself sort of thing.

But, at the moment, as I say, its okay so long as they don't get caught it is not the basis of reciprocal action."

B Hinchco: "It's really been a semi structured exchange. Have we covered all points that you'd like to have said about Middle School, about Berkley Middle School?"

J Crone: "Brian, it's been very structured and, and I give you examples of it is, is that I knew this was going to happen, it was just a question of where. And so, when I arrived here, I started preparing for it in a physical way. So, "Tomorrow's Schools" allowed us to get ahead. Um, we were the first school to shape in a major ways on, on, on our money, not Ministry money. As you know, we only got into that scheme this year, so every piece of money that's been around, every building that's been reshaped, has come from our own resource – no Ministry money at all. Um, and in that time, we've spent \$1,000,000.00 in reshaping the school, which is a massive amount of money over eleven years. You know, it's, it's about \$90,000.00 a year we were finding, additional to money in the system.

So, um, physically we've prepared our environment for Middle School education because I knew that people were going to say what about Science, what about, what about Physical Education, what about The Arts and things like that. Well, when we came to be a Middle School, there was no room for them to ask that because there was a Music Suite, there was a Drama Suite, there was a, a Laboratory-type environment for people to, to work in. There was a Gymnasium. There was a, a place of major assembly that was reasonably quality and so on and so forth. All that, all that was there, so, and it was, it was, it was enhancing what we were doing at the time, and the reason for doing it was for curriculum delivery at the Year 7 and 8 level, but it also, the philosophy was well, we can stretch it

one more year and, and as we were doing that, of course, we were creating slowly a more specialised approach to learn, so that we were getting, instead of the old traditional role generated Specialist versus generalist teacher, that balance was shifting to what I considered to be important to deliver the Middle School type Programme, which is different from Primary and different from Secondary.

And so, um, we've got seven Specialist teachers. Now, for a Roll of 500, we're only entitled to 3.9 – that's what it generates. Um, and so therefore that doesn't happen overnight, and it didn't happen, um, when, when it is already in place, the only position that's been created since the Middle School's is the Science position, they were all in place. So that, so that I could show our readiness for the next – I'm saying to them, well, look, look at the resources – 'cause they're saying "You haven't got the resources that these Year 9's would get in another school", and I'd say "Well, let's closely examine it."

We're, we're talking about physical resources, we're talking about human resources. We had people that were skilful, we had people that were just dying themselves to be able to have the kids go for another year. And again, our Music teacher and, and, and a very good orchestra that we developed by the end of Year 8 she was busting her boiler to actually have these kids stay on to Year 9 – just how much further they could be stretched. Because the proof was, in most these kids, if they weren't the top musician, dropped out of music as soon as they left our school – that was the end of their music, or life, really. One more year would have got them to a level of excellence that would have made them more appealing to the High School they were going on to, and they were less likely to drop out, because High School like, like working with the good kids, and these kids would have got to that next level, as an example.

And so, um, it was by design and it was by stealth. As I say, in 1991 we could have done it then, and chose not to. And so I just kept working at it and putting it in place. Now, how do we achieve that? Well, we achieved it by Roll growth, and we achieved in the, in the new right-wing environment, because when I arrived here, Berkley was 328 students strong and, um, the Ministry would only provide buildings for 400. So our first thing was we built more classrooms – we built three more classrooms. Ah, and those three classrooms mean that we generate an extra hundred kids. And they bought in staffing and they bought in funding – they actually paid for those classrooms.

And so, when we went Middle School, it had to be fiscally neutral – that was the first, that was one of the criteria – which stuffs a lot schools. But we already had, we already had three classrooms in place that had been paid for by a generation of students before who'd got what they came here for, but they'd come from outside our area. Ah, and then, when we had Roll drop, the Ministry had some buildings that they were contributing as well. So, all of a sudden, we now have all our Year 9, 7 and 8 students in Ministry buildings, and we have three spare environments left over that we can actually do in terms of that. So we now employ an

additional three staff, um, and we have the teaching space for them, to provide additional Programmes again that are an extension of the wishes of the community. Now, tell me which High School actually does that? They, they say "No, we've got to do it – the School C, Sixth Form Certificate the seventh form they are our, our, our things we've got to point to and we're an academic school." So we are not into the vocational thing, So you go the local – other – school if you want have Metalwork or Woodwork. We're saying we value all and that, um, there isn't one thing that's more valuable than the other. We resource it accordingly and we make it proportionately acceptable for any student, as they so wish.

So we're still looking at opening the doors, giving them quality experiences. And so, therefore, we are still \$100,000.00 a year greater than any of our contemporaries in terms of staffing. Now, the Asian community have seen that – they shop around – they're a great barometer to what is happening. We generate over \$100,000.00 a year in, in overseas students and I pour all that back into staffing - every, every dollar goes back into staffing.

Um, however, there are side because once you get those kids into school, they generate more funding through the Operational Grant. And so the Operational Grant, being a little more, ah, what you might call for a Decile 10 school, a little more generous – I then pour that back into Capital Improvement, and that's what, that's what's topped up there. And so to fine balance – but what's all this balance about? It's all about being better for kids – not having in the paper me at the top of the list, in terms of ranking and, and, and profile ah, in fact, we get lots of criticism because they still think that we give the kids too good a time – we're the Playschool – that the basics aren't being taught – and it's not helped a mate down the road, Jonathan, who advertises his Roll growth and you got a, a good leap on this, um, by saying, you know, A school that tends to the basics. And, um, for a period of time, when he got a steal on us, he actually got inside the heads of our, our community and said "If you want the basics, no frills education, then this is the place." And, and he took 10% of our students overnight, um, who were looking for three R's.

Now, those kids who moved are going to be the ones who get A & B Bursary anyway – they don't need the basics – they need a broadening – they're going to – they need the aesthetics as well – they, they need The Arts – they need all those things – and, of course, the workforce, ah, of, of the, of, of, for the, they're moving to where the market jobs aren't even dreamed yet, but I do know that it is going to be based around communication, entertainments, service industry, ah - all of those sorts of things – so, um, having them literate in, in, in visual communications – for example, I can have a whole lot of, ah, ah, vocational interest in exploration in the world of television and, and, and in telecommunications – well these kids are getting that here, now. But, if they go on to High School, I know – let's take the computer class – they don't touch a computer – they just haven't got enough – the resources are too small for the size.

And then, Senior students get hold of that. But they need it now – they're in their formative years now. Their attitudes are, are not yet hardened so while they're still plasticine, let them, let them shape and re-shape and squash it and start again, but let them have lots of experiences.

We have the resource base here at the moment that does that um, and um, we keep fine-tuning it and readjusting it. Now, every staff member contributes to that. You know, in a way, we're small enough for everybody to have a voice and we listen. Um, so size of school has been quite important. They turn up and so someone says what is the ultimate size of such a school. I reckon 250 in each group would be okay – not a school of 750 would be as large as you'd want to make it. At the moment, ah, our 500 is just a shade too small in the Year 9 area. And it's a bit like, ah, it's a bit like the University example I showed you. We need 250 in, in Year 8 to generate 40 odd in Year 9 it is just like the Post Graduate syndrome at the moment. But it would be just as good if we had 200, 200 and 200 – you still need mass, a certain critical mass to be able to generate and sustain, and about 5, 527 is the most economical model still, formula-driven but, in reality, somewhere between what we've got and 600 would be fine. But, three 3 Year groups of symmetry will never happen – but it would be interesting. It would, it would change what we do because there would be a significant number of Year 9's that would generate a lot more energy in a certain direction – bit more political activity for example, more, more leadership things, um, that we certainly have influence on what we provide in terms of school structures. But we actually, um, participate in all the High School things now, like Theatresports and things like that with our Year 7, 8's and 9's together, so the Year 7 and 8's are getting plenty to – some people say "What's in it for Year 7 and 8?" You're talking about Year 9 and you think Middle School's Year 9 – period. Year 7's and Year 8's get given a whole enriched environment of resource and opportunity as one, Theatresports is a great example , and that's a Secondary competition and, ah, we finished Second in the Theatresports competition last year, um, and we competed against Hillcrest High for them, for the Second Place to go into the Final – last year we missed out. Ah, we still think that this was suspended without ? . But our kids are so creative, um, with no inhibitions, they're sharp and they think on their feet and they have good tuition – they've got a very good Drama teacher, where, where Hillcrest High hasn't got a Drama teacher – it's got an English Department and they've got skilful people within it, but this guy teaches Drama all the time and so, therefore, as a consequence of it, provides him with a platform so he's getting more skilful. He's refining and developing and, ah, shaping – something that's tailor-made for this – so it's, you know, we're not into Shakespeare in the Shakespearean sense, but the kids are touched by Shakespearean drama, and so on and so forth Its really very clever.

But, what Principal of a High School can speak with enthusiastic and with detail like I can about our Drama teacher? It might have to be the Associate Principal or the HOD would do that, but that, that's a long way from the person that's actually

putting the vision together – who's actually, in the end, making the final decisions as to the balance of staff, etc, etc. so that the size of input for all those things is pretty important .

So, mate, it didn't happen by accident. It happened over time. I think it was well planned – carefully planned, um, and we were ready, we, we, we thought ahead as to the sort of questions people would ask and, um, when they asked them we could say "Well, they've been around for a year or two, or five and already in place so what we're doing now is just providing the window of opportunity that's going to be spread over three years and not four."

B Hinchco: "Thank you."

J Crone: "You're welcome."

B Hinchco: "That's excellent!"

## **Appendix C: An interview with**

***Alan Dennis  
Principal of Tweedsmuir Junior High School***

B. Hinchco: Could you give a brief outline of your career, your teaching career to date.

A. Dennis: I went to College in the early 60's. I attended S.B.H.S and Christopher Wren College in London. A large new school which was a Comprehensive school. A cross between a secondary Modern and a Grammar School and then taught in Southland, as principal in 2 teacher and three teacher schools then two four teacher schools in rural areas.

I taught in Australia for two years, as a senior teacher in a Form 1 to 7 boys school in Sydney. I was a New Zealand trained teacher and expected to teach 51 students, but it was a strict school, and I used a lot of group work, project work. It was run on an American High Style, "ring and run" with little in the way of individual attention. It was a harsh school with exams two times a year.

I returned to Southland and was D.P. at Tweedsmuir for 4 or 5 years, then Principal of Collingwood for four years during which time I visited the United States looking at other schools. I was appointed Principal of Tweedsmuir while it was still an Intermediate.

Children have different strengths and develop at different times and I believe many categorize students too soon. Many "label" students and imply "you are dummies," and children believe it.

B. Hinchco Can you tell me a little about your own reading, your own research into middle schools?

A. Dennis I have twenty years experience working in year seven and eight. I have also been a Principal of a full primary. I have served on the National Intermediate Executive 2 or 3 times. I have always been an avid reader of all things educational. Thoroughly read Stewart/ Nolan's "Lime Green Book"

I was disgruntled that Intermediate schools did not do the full job- just talking about middle schools didn't do anything.

I became a member of the National Middle Schools Association in the United States when I was at Collingwood. For the last fifteen years we have run a teacher/ student exchange programme with Seattle's Meeker Middle School. Over the last fifteen years the name of the school in the Tacoma District has changed from Intermediate to Junior High to Middle School.

I was impressed with the facilities the school had, such as counseling facilities but not impressed with the teaching, “ring and run” system. It is a well resourced school, gymnasiums etc. It opened my eyes to the potential of what we could offer here, they had fine teachers but work not of a high standard. In some parts of America they create Magnet schools with Technology suites and mini theatres to attract students into areas suffering from white flight, they bus the students in.

B. Hinchco      What do you consider to be the strengths and weaknesses of two year intermediate schools.

A. Dennis      There was only one Intermediate School in Invercargill where I spent my P.A year and I have always spoken with a passion about them, I have always supported the two year model.

With primary trained teachers in the classroom, teaching students not subjects, which is not always the criteria of our secondary colleagues.

Then when you read about the needs of emerging adolescents, the 10 to 14 age group, with their huge growth spurt physically, why stop this in the middle. Give schools the opportunity to introduce students to semi-specialization but with a home room base. Most children can look back and remember Intermediate School as the best years of their life, where they were challenged, more competition but with the comfort zone of a homeroom teacher. They have the opportunity to grasp responsibilities without little children about, not reading to the little kids, not being pie monitors. They love leadership opportunities, love their badges, for many the first time to wear a uniform.

Teaching in an intermediate is a lifestyle, similar interests together. Important to staff the school with those who like this age group. Different teachers with different expectations but in a comfortable environment. Learning style rooms, groups of year 7 and 8, flexibility, with interests and learning styles recognized.

In my experience the transition between year 8 and 9 has not been done well traditionally. 15 or 16 years ago I was asked to speak to local high school about the issues that they needed to address, what concerned parents.

- work had already been done
- in classes where the teachers didn't care
- teachers did not know their children
- single subject teachers who taught large numbers of students
- parents didn't feel welcome.

Year eight students who enjoyed school suddenly turned off because “the teacher hates me” or “I don't understand what the teacher is saying to me.”

The disadvantages of Secondary schools have not changed all that much in the last 15 years.

- bigger classes
- less experienced teachers
- not treated as independent learners
- pour in the information
- gaps of 2 or 3 days between classes.
- Totally inflexible timetables

Children love peer assessment, planning their own learning and a teacher who loves them, you don't always get that in a high school.

My own personal experience of year ten in a high school, I dropped maths in year ten, "I had a bloke who prattled on  $a=b$  I didn't understand him. I'm not a dummy so I took French. Yet at the same time I was doing dad's books as a small business owner." The teacher did not ensure that I understood before he moved on- he did this every period!

Its like an escalator you just hook on and go up as you get older, year nine third form, year 10 a wasted year waiting for year 11 and school certificate.

Our students go to 5 or 6 High Schools, but they don't want to know you unless its enrolment time. We have a full assessment system, they don't want to know our results. At the suggestion of ERO we did School certificate Maths and English, we finished top of Southland with our School Certificate results, one year early.

Ingredients of a successful school are

- [1] common philosophy
- [2] dedicated staff
- [3] sufficient resources
- [4] strong P.D.

Enthusiastic leader is a must.

B. Hinchco Could you outline your particular middle school structure and philosophy.

A. Dennis Tweedsmuir is a decile two school with a capped enrolment zone. When we started we had a roll of 402 and now we have a roll of 560 with three new schools having opened in our area. We have 130 students going into year nine. We received a special award this year for the level of excellence we have achieved. We compete for year 7 students with 9 local schools in South Invercargill.

We team teach and plan together, assess together. We factor in a flexible timetable which can run for several days. Cross curricular studies, units planned with students having a huge input. An integrated curriculum, then students present learning to their parents. This is far more meaningful learning, acting and living their learning.

Teacher's assess as a group, peer assessment, even the slowest students can make a comment on presentation," students see good role modeling. Children, become more caring, acting like young teachers.

We have daily numeracy and literacy, setting the highest possible academic levels. These subjects are ability grouped.

We ensure heaps of responsibility for year 9 and 10, mentoring the year seven and eights. Leaders of houses, year nines run assemblies, thank visitors, coach teams

Children love seeing positive role modeling, we deliberately role model showing that adults can have different opinions, its great, where at home they often see that their opinions don't matter.

B. Hinchco Could you tell me a little about your community in Invercargill

A. Dennis There was an initial reluctance by the local high schools to us becoming a middle school. We took the moral high ground, used our own resources to build two new classrooms, no patch protection, we were after roll protection. Our philosophy was- and still is, to best meet the specific learning needs of emerging adolescents.

Two of the high schools had to become one, then the Ministry poured \$11 million dollars into the survivor, then allowed them to enroll year 7/8 students !! Not good for harmony Wyatt Creech was the Minister of Education at the time. Decile 2 doesn't mean anything, many of the students do extremely well and the extra funding goes into 4 or 5 languages, extra music, future problem solving etc. etc.

We have a "normal" cross section of New Zealand population 20% Maori, 8% Pacific island group, Samoan and Cook Island. No Asian students.

B. Hinchco Several of the other interviewees have mentioned the impact middle schooling has made on their Maori students. Have you any comment.

A. Dennis I have visited Ann Milne's school and was blown away with what I saw there. We had bilingual classes for eight years then two years ago we dropped them, their students were the worst behaved, put each other down. We have mixed our students up and ERO reported no significant difference between Maori and Pakeha students.

The MOE have established a Kura down the road with a predicted roll of 550 but it currently has a roll of 180. It was not perceived as a positive school by the community. All our students are treated as New Zealanders.

The trend is for more to stay onto year nine, in the first year 23 stayed for year 9 this year 130 have stayed. Where 20% were staying now 70% stay. We will have 80 in year ten. They are choosing not to go to our area High School, even though it is brand new.

B Hinchco Have you any further comments you would like to make about middle schools.

A. Dennis Middle Schools must be stand alone schools for three or four years, even years 6, 7 and 8. They must have autonomous staffing driving it as a middle school rather than as a mini high school.

We have a lot of visitors from High Schools (Nuie, Nelson, and Invercargill High Schools) who would like to do what we are doing but are unable to because of how things have been traditionally done, we can trial new things. Many of their staff are unwilling/ unable to team teach.

When we started, Invercargill Girls High School said that our students would be two years behind, they would do their best to catch them up, that they wouldn't take them. Now our year 10 students are highly sought after by all the High schools in town.

I'm opposed to the "ring and run" of High School periods. With a five minute break between each of seven periods in a day, times five days a week, times 40 weeks of the year, tell parents it mounts up.

B. Hinchco Can you outline the various relationships with other educational providers that you have encountered.

A. Dennis The MOE they were very helpful when we made the change, they have always been supportive.

We have had very positive feedback from the High Schools. We attempt to address what we hear from the High Schools, we hired a lab science teacher as we heard that this was a 'weak' link. With our decile two children now being selected by the top high schools in Southland many have had to change their teaching style.

We have been a middle school now for five years. Every staff member is staying on next year and we are taking on another four or five staff, with the exception of one going onto an ICT Contract.

A major plus has been the many more management units we have now.

B. Hinchco Do you believe that middle schools can be a viable national alternative.

A. Dennis many of my colleagues say, if you are in a comfortable intermediate school why rock the boat?

Where EDI's are happening, the middle school should be offered as a viable option, it should be offered to the parents. Not middle schools necessarily but middle schooling, the concept of middle schooling is more important, but wherever possible they should be stand alone schools.

A staff member, Neil Potter won a Beeby Fellowship and wrote a book about our work. We get little real support from the current Minister.

We are called Tweedsmuir Junior High School because there was already an Invercargill Middle School in the centre of town, otherwise we would be Tweedsmuir Middle School.

## **Appendix D: An Interview With**

**ANN MILNE  
PRINCIPAL OF CLOVER PARK MIDDLE SCHOOL**

**B Hinchco:** “So, to start off with, can you tell me a little bit about your career in teaching first of all, – I’m looking for that philosophical background.”

**A Milne:** “Sure. Right, I started teaching all my career would have been at intermediate level, pretty much, yeah, all of it. I started in Whangarei, and out in the backblocks of Whangarei, nearly always with high numbers of Maori students, so, and I guess I thought initially, I was a fairly gung ho sort of teacher – no problems with discipline or any of those things. I think my wake-up call came when my own children, whom identify first and foremost as Maori, even though I’m not, hit the secondary system. My oldest daughter went into the third form and ran smack up against some, pretty heavy, well, both institutional and personal racism, you know, there’s no other word for it, and I watched her go from being pretty outgoing and articulate to someone very withdrawn. She really made me look at what I was doing. I thought, well, you know, some things she was saying I was probably guilty of doing myself, and that really was compounded when my subsequent three children all had similar experiences.

So I thought, well, if I can’t do much about the whole system at this stage as a lowly Scale A in an intermediate school, I can do something about happens in my classroom, and so I made a conscious decision to do that. I did a lot of thinking particularly about Maori education, because that was the place I was at then, a lot of talking and listening – mainly listening – a lot of trial and error, and then I changed my classroom to be much more group-oriented and whanau-based. I tried to eliminate this difference between home and school because what my kids were getting in the system wasn’t anything like my philosophy as a parent. I also started reading about, you know, what worked and what didn’t.

Then I got the opportunity then to move from Whangarei down here and, came to this school, actually, in ’83, - way, way, way back then – and then, of course, had to factor in all the other cultural groups that are in this school that I hadn’t encountered before. It also caused me to think more about Maori education. And how I could do more within the open plan structure that we have here.

I was given after the first year, the opportunity to move into another team in this school which was interested in, at that stage, doing something about ‘Taha Maori’ – the catch word in those days. At first we just added in some Maori language – I didn’t think it was particularly useful, but it did lead to quite a lot of lobbying with the then principal on behalf of a number of Maori and Pacific staff at that time, about making things more, you know, user friendly for the community, so that was the next stage I guess.

I then was given the opportunity to be the Senior Teacher of the unit that I was in and then started pushing very hard for a bilingual set-up. At that stage, there were no Maori bilingual units in the country at intermediate level – there were several primary ones – but we were the first at intermediate level. It took a lot of, a lot of hard work to get that approved, and no funding of course.

And so, for the next couple of years, it would have been around '86 – '87/'88 I guess, we tried to see whether having a lot more Maori language, being much more Maori oriented in the classroom programme made much of a difference to the kids, and we didn't think that it did actually. Again I went back to my original thinking about structure – you know, it wasn't the language, it was the way we were delivering, and so we made a lot of focused changes, much more integrated curriculum, a more holistic approach, intensive blocks of time, all of those sorts of things we started to talk about then. I started to read more research – at that stage I had read nothing about middle schools. In 1990, some of the kids that had been really high achievers with us in Form two, four of them actually in the first six months of 1990, basically arrived back on our doorstep – you know – they'd either been suspended or were about to be, or were truanting or just fizzled out – and they had been our top kids. One of them had won the National Maori Speech Contest and we thought it was just awful that they weren't doing equally as well at high school.

So, the parents said "Well, they were fine with you and we want them to stay here", and we said "You can't". They said "We don't care if they don't, you know, go into Form three or whatever, we're just going to leave them there." That was exactly what they said. We had a group of quite militant Maori parents who were very clear about what they wanted. They even went to the Parent Advocacy Council which was set up then to get support. Having had the same experience with my kids I related with and had a lot of empathy for what they were saying. So, those four students became fourteen and then twenty-four overall in the next year and we entered into negotiations with the Ministry then to keep them. After a lot of politics and argument we ended up with an arrangement where they were attached to the local secondary school - which posed all sorts of additional problems and later fizzled out.

But what the Maori parents were asking for were exactly the same as what we came later to relate to middle school philosophy. The two matched because although our Maori parents didn't know anything about middle schools and nor did we at that stage, they were asking for – the one significant adult or a group of significant adults that the kids knew well. They wanted teachers who knew their kids well, and their kids could relate to and the parents had a relationship with. They wanted them to feel secure and safe at school - the whanau environment was the way they described it. We'd done a lot of talking with our parents about having a greater length of time and all those sorts of things, you know, service to the community, bringing in elders, becoming much more involved in the school

with kids. So, all of those were things they wanted as well as firm discipline. They wanted to know that the kids were not going to get into trouble, so they wanted guidelines and they found that when their kids went off to secondary school they didn't get those. So, it was interesting later to see that match and between middle school philosophy and what our parents wanted.

In 1993 I left Clover Park Intermediate School to lecture in reading and language at the Auckland College of Education for a year – and hated it! When I was in there one of the groups I worked with was the inaugural group of Maori students in the mainstream looking specifically at bilingual education. I found the College of Education to be a giant, immovable object and, felt frustrated by the same politics and resistance to trying anything different for Maori learners.

At the end of that year the principal at Clover Park Intermediate School retired and I applied for and won the principal's job. I came back to find that what had happened in that year was that the older Form threes and fours had been attached to yet another local secondary school and it hadn't been any more successful. The secondary school principal wanted a high degree of control over the programme, and wanted something completely opposite to the philosophy we'd been developing before I'd left. New staff had been appointed, the development of the philosophy had been significantly changed. Maori parents had lost confidence and the momentum had been lost. It became a real battle because, although the principal of the secondary school had the legal right to be in control, the programme had lost its unique character and the new, secondary appointees to the senior teaching positions felt they were only accountable to the secondary school.

So, right in the first few months of '94, I started saying to the Ministry and the Board that this arrangement wasn't working. Fortunately we had the same Board that I had left which included several Maori parents who had been involved in the previous negotiations. They started saying to me why can't we go back to doing what we were trying to do before – become a Form one to four unit in our own right?

So, we, contacted the Ministry and said what do we have to do in order to get out this special arrangement – that was the first thing. Then I received a phone call from [name deleted from transcript] from the Ministry in the very last week of April of '94 and she said, "Do you know that now you can apply for a Change of Class?" and I said "No, what's that?" and she said "Well, there's an Application Form I can fax you – you have to have it down to Wellington by Monday morning – this was the Friday."

Jenny said she had already told them that I had been asking questions about, legitimising our Form three and four, and she had alerted them to the fact that I would probably get something to them by Monday. I think the Friday was actually the cut-off but they said they would give me the weekend.

So I spent the weekend going through all the archives where we had, you know, parents' referendums and petitions and letters from the previous four years and unearthed all those and just them bundled them all up and sent them off to Wellington by courier with a very sketchy and basic change of class application form – and heard nothing more. I thought, well, that's never going to happen – they didn't talk to the secondary school that was our host school – they didn't talk to anybody really, so neither did I. I mean, I just thought well, it was pretty much a non-event, you know, it had just come out of the blue.

And then in July I received Lockwood Smith's letter that said, "Your Change of Class has been approved." Well, then the shit really hit the fan. The community and the local schools just absolutely slated, slated me. There were lots of very awful meetings, you know, principals, colleagues – particularly the secondary ones, although it wasn't just secondary, it was all of them. They all thought this was such a terrible thing to do and it didn't matter how I tried to explain that, you know, I was a new principal in the job; I didn't know about the processes, I'd done what the Ministry had suggested. I really thought I'd had zero chance because I had so little time to prepare. I hadn't deliberately kept it secret. As far as the local secondary schools were concerned I'd deliberately gone behind their backs to get a middle school established and this was a threat to their falling rolls.

So, really, although we were pushed into it, we were definitely coming from a philosophical base - I mean, the more we looked at middle schools around that time – John Sutcliffe and Brian Davidson, Doug Thwaites were talking middle schools then and I had been corresponding with John – the more we realised, well, there was such a match with what we'd been trying to do that that was the logical way to go.

It's interesting to find that now we're in the same situation with a group of senior secondary students who have come back and said exactly the same thing as those students said twelve years ago. We definitely don't want to be a secondary school because of this but we have a group of fifteen, year eleven to thirteen kids who have basically loved the education they had here but have left their respective secondary schools or have refused to go. They are sitting back here in the classroom while we fight with the Ministry – and the Ministry have tried, to make us apply for a Change of Class. So, I think that if they could get rid of us as a middle school even now, it would really suit their purpose beautifully. They know perfectly well that they would never give us secondary school status, so it's game-playing again but, it's that sort of process.

B Hinchco: "Thank you for that. Going back to that period, '90 to '95, and your own reading about middle schools, your own research into middle schools, can you comment a bit more about who was influencing you as far as the readings you were doing, the people you were talking to?"

A Milne: Gosh – that's a memory test. It was pretty much influenced by the things that, you know, things are probably all out of kilter here, but, the intermediate/middle schools publications first, – when was the Green Book ?”

B Hinchco: “93”

A Milne: Well that was, you know, one of the first things, the Intermediate Principals Association was promoting that at the time, and the reading subsequently developed from there. Then further through a course in about '95 I think it was with the College of Education in Christchurch – I've put the whole staff through that paper. There were other influences. I had started reading Lipzitz's work and some American NMSA's publications - John Lounsberry – probably the lime Green Book, Pat and David's (Stewart & Nolan) initially, and then following up a lot of their references and starting to put it all together about the developmental needs of this group.

B Hinchco: “So, prior to becoming a middle school, looking at the intermediate school structure, what do you perceive to be the strength and the weaknesses of the two year intermediate school”

A Milne: “I don't think it's long enough and I think that we're cutting the kids off, you know, before they get to the end of that stage of development. For us, here, the fourth formers are absolutely crucial and, it just seems to us that the two years was never enough – you'd just start to make a difference and they were gone. In terms of what we were doing here, with a very culturally based programme, we had a lot of de-programming to do when they first arrived, you know, in terms of their expectations of school. They didn't expect school to reflect their cultural base, or to say that being Maori or Samoan mattered. We found we were just starting to make some changes in form two and they'd leave. In terms of their maturity levels and development in the third and fourth form, our fourth formers are wonderful you know, and, looked upon by the other groups as real role models. I think they develop a lot of leadership in that year and a lot of confidence in themselves.

I think the whole issues of identity, you know, the development of identity and who you are, is particularly difficult for kids who are either Maori or from minority cultures in our New Zealand system. I think that, at that stage, developing that sense of who you are in order that you can carry on and learn with confidence – it is really important, so I don't think that two years gives you anywhere near long enough to do that. The same applies to developing relationships with parents and getting parent involvement in the school and lots of two year intermediates find that very hard. There's much better continuity when there's a four year span. With two years you often get gaps of two or three years between siblings in families – you might have a child go through and then not get siblings for three or four years. We now have a lot of families with more than one

child in the school, so you have a buy-in from those parents for a lot longer period of time.

It's the same with curriculum really, especially with the seamless National Framework. We find that, we are able to keep consolidating and building so we see a big difference in the kids' learning in the third and fourth form levels

B Hinchco: "The middle school structure that you have here, ah, is probably unique and all of the middle schools in New Zealand are unique. Would you like to explain the structures you have here?"

A Milne: Well, we have a 99% Maori and Pacific, roll. So we have one, - two this year, Pakeha kids in the school. It seems to make sense to us that, we deliver a programme that's absolutely relevant for Maori and Pacific, kids, so working again, from reading and thinking and developing through trial and error, we've hit upon – that's not the right word – no – we've tried and worked out that what seems to work best for our kids is, a structure where they are with their own ethnic group. That raises eyebrows because, you know, people are all for the 'melting pot' things.

The school is structured in four open-plan (variable teaching space) units, two of those are bilingual. Each unit has either three or four classes. There is a Maori bilingual unit with three classes and a Samoan bilingual unit of four classes. The other two open plan areas in the school are mixed ethnically but one has a predominantly Tongan make-up and the other has the largest number of Cook Island students in the school. The bilingual units are by choice, parental choice. If they don't choose to go into either the Maori or Samoan unit, they'll go into one of the other two mixed units, so there are Maori and Samoan kids in both of those units, and that works really well. There are plenty of opportunities for them to mix but it allows us to focus our resources and programmes effectively. We employ people from the community who speak those languages fluently through a range of WINZ employment schemes. We are able to employ someone who speaks fluent Tongan in the area where the Tongan children are. We are able to have curriculum content relevant to, and that builds on their background of Tongan experiences or Maori experiences and allows them to bring all of those experiences, to school and have them validated and used as the building blocks for their learning.

We are vertically grouped from one to four years which has also raised eyebrows but it works really well. The problem with it, I guess, and I don't think it is a problem actually, is that the complexity of it means that teachers have to be very skilled at multi-level, content delivery, and they are. We put a great deal of professional development into that and, basically, it doesn't matter whether the kids are in year seven or year ten - it's about ability. So, we identify where they're at and then move them on from there. If you're in year ten and you have real difficulty with Maths, you can be working without any stigma attached to it at

year seven. Our kids are used to working in that whanau type group, and this is seen as nothing but normal.

When your own culture at school is normal and a genuine whanau - multi-aged structure is also normal, this what the kids expect to happen and the distance between home and school is reduced.

B Hinchco: "Having set up such a unique situation here, has that created criticism from ERO or the Ministry that you have had to address?"

A Milne: "Never from ERO, never from ERO surprisingly. We have good ERO reports but definitely from the Ministry and more so since the intervention of the Ministry in Mangere and Otara schools. I've been told by the Ministry that if we would just:

- (1) get rid of the vertical grouping, and
- (2) "Get rid of that cultural stuff" – that's the very quote

- we would have a lot more kids coming to the school. That, according to the Ministry, is our basic 'problem'. We are catering for a 'niche' they tell me and that might be so, you know. Certainly the exodus of kids out of Mangere and Otara is an issue for all of the intermediate and secondary schools in the area and we do suffer from that, but it's more because we're on the periphery of the community and its easier for parents to be outwardly mobile than it is for the schools in the centre. It's also because there are intermediate schools in an affluent area of Auckland, who make it easy to bus a large number of students out of this community every day. Those things put us at risk – but it's interesting that the criticisms are always about those sorts of things. None of them have ever said to me that the kids are not getting a good deal in terms of their learning because, clearly, ERO says they're not, so the Ministry can't say those sorts of things, though I know they'd like to.

B Hinchco: "On a national scale, then is it possible that middle schools just are catering for niches and are not a viable national alternative?"

A Milne: "No, I don't think so. I mean if middle schools are about this developmental stage, kids are at that stage, whether they are in Invercargill or Whangarei or wherever. I think middle schools make sense for this age group. I'm never, ever sure why it is that that's such a difficult concept for the Ministry of Education.

It's secondary schools, I think. We are always coming up against that secondary school anti-brigade that, exist in large numbers in the Ministry as well as out there in the schools themselves. When you talk to parents there is always instant understanding about the needs of this group of young people. It just seems we haven't understood it in our education system. It is exactly the same opposition that we're hitting now with this senior group who are alienated from school. It

was bad enough that we had third and fourth form students. They are furious now that we have older ones.

B Hinchco: "So, would you like to expand further on that secondary opposition?"

A Milne: "Yes, well, mmm. Personally, it's, it's pretty hard to take, you know. If you take it personally, and sometimes it's hard not too, the vilification and absolute isolation that you find yourself in as the principal of a middle school trying to, to get anything supported is really damaging. I've stopped justifying. I used to do a lot of justifying to all and sundry, now I just don't. We exist, and there's plenty of research that says this is a legitimate option. We have official status although that's debatable too sometimes. But, you know, it's never-ending, the opposition the sidelining and, and the deliberate not getting it – the deliberate refusal to recognise you as legitimate and credible. For example you get requests from the local secondary schools – can they come in and recruit your form two students, and for ages I let them do that until last year I said "Why?" I don't come into your third form and see if I can recruit your fourth formers – it's the same thing, and I've had to have heated arguments with the principals about it.

So, it's a tense relationship and I guess I envy the communities such as Hamilton, where obviously all that seems to have been easier, I guess, but I don't know whether those principals would say that. I think it is particularly difficult in a community like this where you're a very low decile school and where everyone is competing for students and so you're forever battling the idea you became a middle school because you just wanted extra roll numbers. Nothing could be further from the truth. At the time that we became a middle school, when we started talking about keeping the third and fourth formers, we had the highest roll that the school's ever had. At that time, there was no busing out, there was no falling roll, we were quite comfortable with the roll that we had at that stage. But you will never turn that thinking around. Constant carping on about the fact that, the kids don't know their periodic table, from Science teachers and stuff like that that's not legitimate and just simply is not true.

The AIMHI (Achievement Initiative in Multi-cultural High Schools) research that was done a few years back, was actually quite critical of us – it didn't name us – but we were the only middle school here in 1996 - in terms of the effect we'd had on the local secondary schools and their only basis for their criticism was comment from a small number of third formers who had dropped out of our Samoan unit at the end of the third form year (in 1996 we had only had one year in official operation) They never spoke to us at all. Some of those kids had been our most difficult kids – it certainly wasn't a fair sample and yet we're in this research that middle school just doesn't work. That type of thing that goes on all the time – it's hard to deal with. I mean, I've got fairly broad shoulders and a pretty hard shell and I manage to pay as little attention to it as possible but, sometimes, you know, you're defending your staff, you're defending your Board, you're defending your students - you're defending on all counts. There has been

some pretty nasty media – articles in the local newspaper that have been initiated by secondary school principals, and it's just a dirty game, and completely unfounded.

You know, there is no evidence their structure works any better than this and, they can't find anything that says ours doesn't work. In fact, ERO did a comparative review of year nine and ten provision in Otara. At that stage, the other two intermediates who were trying to become middle schools and that certainly didn't help our situation I don't think. They had year nine and ten kids, some were on our roll, some were on the roll at Papakura High School. ERO compared the programmes in the three intermediate/middle schools and the year nine and ten provision in the local secondary school and our report was great. So, the local secondary principals would love to find something to criticise us for, but they actually can't. Just a couple of weeks ago, I tried to negotiate a deal with them for these fifteen older kids, I was told by one of them that I was a 'threat'. I'm a threat to them both and that's all there is to it he said! I don't quite know how, but that's it apparently.

B Hinchco: "Nationally, ah, everything being equal, should we go the middle school way in your opinion?"

A Milne: "I'd like to see that but I doubt that we will. I mean, I would like to see all of our intermediate schools learn a lot more about middle schooling philosophy as opposed to 'business as usual', or what they traditionally have done. I guess there is room for two, three and four year middle schools and we need to get our heads around what that means, what the options are and what that means for kids first and foremost. But I think it will take a fair few years for large numbers of intermediate principals to do this. Maybe it needs a change of, ah, some of the older, old brigade who need to move out and have fresh thinking come in. I think we've got to look at what our intermediate schools deliver, and what is fair criticism of some of our intermediate school practice. So I guess I'd like us to embrace it more in terms of philosophy than worrying too much about the, you know, the structured year levels and the number of years the kids stay there – although I certainly think it works far better with three or four years."

B Hinchco: "Would you like to talk a little bit more about the criticisms of the current intermediate practices that you see?"

A Milne: I think some of our, a lot of criticism comes from within our own ranks and I don't think we've yet had the debate that defines exactly what it is that we're talking about or what it is that we do. I think we have too many conservative, long-held views that need challenging because I think a lot of our intermediate schools border very much on what our secondary schools do, and scarily, some are becoming more and more, you know, specialist subject oriented and non-integrated, and I think that's a crucial difference.

I think we have to ask ourselves if what we do in intermediates replicates what exists in secondaries now, then what's the point really in us existing? I believe that most intermediate schools do get a balance between, integrated and subject specialised curriculum. I don't think they think a lot outside that, you know? I don't think there's a lot of thinking about how kids learn. I think there's plenty of just delivering the status quo – I guess that's my biggest problem with it. I think we need to really shake up that whole debate about what is it that we do well and, and what is it, that we as a whole sector think about curriculum, kids learning, significant adults, curriculum integration, community involvement, service learning – all of those things that come up when you talk about the developmental need for challenge and higher level thinking, and we don't. We just keep on doing what we've been doing and think that'll do."

B Hinchco: "So, an ideal middle school would look like what in your mind?"

A Milne: "I think it would have a staff, first and foremost, who had done significant professional development in the age group and, and into middle school theory and philosophy and a lot of talking about, with parents, with kids and amongst themselves about what fits. I think that should be the catalyst – then see what develops out of that. I don't think we do that level of professional reflection necessarily.

I think it would have plenty of choices for kids. I think it would have a negotiated curriculum which would cover issue young people face and want to know about. I think it would have a high level of involvement of the community and it would have opportunities for leadership in the whole range of areas. I think it would have strong, pastoral support that would clearly understand and support the developmental stage of the young adolescent age group. It would provide emotional support, look at the issues of bullying, look at the development of identity and relationships with each other.

All those things add up to an environment where those needs are understood and supported. Obviously the school would provide a range of, learning strategies, environments and that challenge kids in a whole range of ways. For us, the integrated curriculum has been the way we've been tackling that – to look at issues that are important to them. That would be my ideal. It would be culturally responsive and would eliminate the difference between home and school for students who are not from the dominant majority group. It would recognise that kids have different cultural experiences and backgrounds to bring to support their learning and shape the development of who they are.

That's what I'd like to see.

[B Hinchco: "Shall we go back to a meeting with Trevor Mallard?"

A Milne: "Yep. I argued. I said I've sent down all the paperwork about these fifteen kids. They are ex-students of ours and their dissatisfaction with the education they received in their secondary schools has led them to drop out or refuse to go.

We had an arrangement, at that stage, which was back in November of last year, with Papakura High School to put them fully on their roll and as an attached unit and that was all about to be signed by the Papakura Board. Then we decided we'd be courteous and notify the Ministry and everything ground to a halt in the Ministry while they dealt with this rogue Clover Park. They came back with the argument that that was illegal. We sought an independent legal opinion from the Education Law specialist in Auckland, who found the Ministry's ruling bizarre. The Ministry's legal experts, in Wellington, are using the word 'restricted' and the restricted composite status that all middle schools have, and it's a cop-out. The lawyers we used say that's just absolutely ridiculous. It's treating middle schools completely differently from every other sector, and that shouldn't happen – it's inequitable.

So, we argued that, that it wasn't illegal. I went down to Wellington and managed to arrange a meeting with Mallard, through a Maori Member of Parliament who interceded on our behalf. He threw the papers that I'd sent down on the table and said "You're not doing this, it's illegal." I stood my ground and argued for twenty minutes and finally got him to say that we could do it for a year if we attached them to a local secondary school, meaning Tangaroa College.

So, I came out of that fairly battered and came back and tried to do that, but they wouldn't have a bar of it, so, then again we tried Papakura and, again – we were in about January by this stage – they were still happy to do it until the Ministry visited them and pointed out that it was going to affect their staffing. We didn't expect them to agree if their own students and staff would be compromised so we agreed there was no way around the situation with Papakura.

The Ministry, and the Minister, kept talking 'networks', you know, use your local network of schools. The network will provide for these kids, meaning the local secondary schools. We said they've tried that and it hasn't provided. Most of these kids are affiliated tribally to Nga Puhi so we said why not a Maori network? We approached Te Kura Taumata o Panguru (Panguru Area School) in the Hokianga to ask them if they would put our students on their roll. The Ministry sent two staff members to Panguru to try to talk them out of it but the principal and Board would not back away from the arrangement.

Mallard then sent us a letter in March saying, he now withdrew his approval so we would no longer be able to have them and he'd send the Ministry out the following week to help the parents place them somewhere else.

The regional manager of the Ministry, Terry Bates, and all the Maori Ministry staff from Auckland arrived at school on the arranged evening and our wharenu i on the marae was full of people. We didn't think the kids would get an opportunity to speak so we'd ask them to write letters during the day. They shared their letters with each other and we asked them to choose three speakers just in case they were asked to say something. They picked the three most unlikely – not the ones we would have picked at all, so we were thinking, oh, God not those kids what are they going to say? We had the local Kaumatua, parents, grandparents, school staff and Professor Russell Bishop had sent up his researcher that day from the University of Waikato. The lecturing staff were on strike I think so Cath had come up to talk about the indicative findings of the research they'd done with us into year nine and ten Maori, students in the eight secondary schools I think they'd been working in.

Terry Bates started off by saying well, this what was going to happen, and the elders on our side said "We want to hear from the young people". The three students were just amazing. They just talked about what they found here that they didn't find anywhere else, and I think there was a dry eye in the whare. The Maori Ministry people had their heads down on the floor almost and, the kids did this amazing haka that was the most spine-tingling thing that I'd ever seen. It was totally unpractised, unrehearsed – it just happened. The parents all stood up and said "This is where I want my son (or daughter) to be". The Ministry had tried to say they're not going to get proper learning here and the parents said "I don't care. You know, last year my son (or daughter) was never home. I couldn't find her. This year, she's in her bedroom doing her homework. You know, we don't care. They just want to come every day. They get out of bed in the morning and want to be at school. We don't care what they're learning, actually, we just want them to stay where they are, and they are learning, they're all working very hard."

Cath spoke about the research and said she had been sent by Russell Bishop to say that unequivocally what we were doing with our Maori students worked – and that was something they hadn't found in the other schools in the research group. Her message, put very strongly, was that they could not send these kids anywhere else.

So, the Ministry had to back off and one of the Maori staff from the Ministry stood up and said why couldn't we form a working party to re-submit, a second, report to Mallard. So that's what we've been doing and, in the meantime, since then, the Ministry have tried to work – the Maori Ministry staff I have to say - have tried to work against the 'party line'. I think they have been clobbered often from higher up, but, there is a report drafted and ready for Mallard which we have had a say about.

What we have finally achieved is an arrangement which is not very satisfactory but which legitimises them for the rest of the year and gets them three free Correspondence School papers each. That requires us to provide supervision and resourcing and deliver Maori language as a fourth subject – all with zero funding.

All we have asked for is the chance to provide for a small group of Maori students at this senior level. We have offered to cap the number at twenty. We have no wish to change status from middle schooling which we are passionate about. We are also strong advocates for Maori education which fits and know these young people will be lost to learning if we don't provide this option. There is no bilingual or Kaupapa Maori based option at senior level anywhere in Otara or anywhere near this community.

It's always that sort of anti, confrontational, putting up barriers stance whether it's the kids at that level or whether it's, you know, the middle school level that gets so hard to take. The Ministry has no parameters for looking outside their little boxes. They have absolutely no – I've never found anything innovative or any support for anything innovative from the Ministry – ever. It stinks.

And it's the same thing – these parents are saying exactly the same thing as the parents back in 1990 said. It's about people who know their kids well, an environment where their kids feel comfortable, an environment where their kids grow to be confident, an environment which challenges them, an environment which sets them on the straight and narrow, an environment which cares about them.

We really put these kids through the third degree – What is the problem? Why haven't you worked at your secondary school? They all said the same things. They wanted to work, they wanted to achieve but felt they were invisible in the schools and were unable to be Maori. Almost every one of them said, if I drop out no-one will care.

All of this came about because we hosted a big Maori festival, the secondary schools Kapa Haka competition in October last year. People sort of arrived to help, you know, and these kids would be hanging around and helping during the days leading up to the event. Over and over again I and other teachers were saying "Why aren't you at school?" – "I don't go any more, I left in March" – "What are you doing" – "Oh, I'm doing a course" – "What sort of course?" – "Oh, I hardly ever go" – you know, this was like eight young people, most of whom had been high achievers when they were here. The parents were here too helping in the kitchen with all this preparation and, they were saying "Oh, yeah, my daughter too – that's happened to us too".

Again, the parents came to us and said "Look, why can't these kids come back?" and I said "Because they can't, you know, we just can't" and then, the more I

thought about it, the more I and the Board thought well it's just the same thing. One of these kids happens to be my grandson – again, I could see and I knew exactly what they were talking about. If he couldn't make it with all of the education-aware people he has supporting him in his family, what hope do other families have with none of that knowledge about how things work. So, that's it really – it's interesting to me that it's exactly the same fight with exactly the same resistance and they haven't moved on from when we did it the first time. There's been no change, and yet they state that their top priority is raising Maori achievement and reducing disparity, but it only matters if initiatives fit their preconceived idea of what that should be.

## **Appendix E: An Interview With**

### **TREVOR ROWSE PRINCIPAL OF NORTHCROSS INTERMEDIATE**

B Hinchco: "If you could start with your career in education and the background of your school community"

T Rowse: "Well, this school was born in 1970 and Murray's Bay was an established Intermediate and that's the way it's been since then – there's been no other Intermediate in this, close enough to come to in this area and then more recently, Hibiscus Coast Intermediate, which is quite a long from here. We still attract a lot of people from out of area but most obviously go to that other intermediate

So our Zone, which is huge, has not changed since the day that school opened 32 years ago and it has been up and down from 900 and went back to 500 and has gone up now to 1,130 counting 46 fee-payers. The pressure on the district has reached the stage now where we don't want to lose any of our school fields. We believe that the school's big enough and we have just about reached the plateau area in the local established places where people live. However, there's a lot of 'green fields' development. Nobody can tell what's next and how many people are coming in to the style of buildings of Coronation Street buildings just over the road from the school literally and just on the other side of the hill. There are probably hundreds of houses in this area where there used a dozen in the old days that used to have a new development of dozens of houses, not hundreds. Just waves up and down the hill. It is just incredible to see them out in the country of what you thought you would see in the city.

So we are in the crux of having to choose between a new school in Albany, and that school could be an Intermediate or a Middle School or a 1 to 7 school – they're negotiating at the moment. A paper's just come out this week on the final solution, they say the parents have a choice but I don't know whether they have much choice as the Ministry will have the final say. [The Ministry has shafted us – we are now planning to have 80 fee-payers next year to fund three of our own classrooms or else we will go under, like the Titanic]

The Ministry could say that the population trends around here means that Northcross could cope for another two years with the same population. It's very hard to judge what we thought our population was going to be two years ago – it went up about 80 then last year it went up about another 80. Where they came from – nobody really knows – people arrived. We've also got an interesting situation where there's two Colleges. Long Bay College and Rangitoto College, are very, very strong, but Rangitoto has probably got twice to three times the reputation. They built it up from good exam results so they've got about 3,000 kids and Long Bay's got 1,200 and people now, after they've enrolled here, shift

out of the district to go into the Rangitoto Zone. Zoning literally caused migration like it used to be years ago when people wanted to get to Rangitoto used to try and get to Murray's Bay Intermediate. Now they're not avoiding our school, but they actually shift, so we have a lot out-of-zone, probably 35 out-of-zone students at the moment, who were in zone when they arrived here.

So, if the Middle School starts there, I believe that Rangitoto College will cause a huge fuss because they're saying they want them from Day One, they don't want them from Fifth Form. I use form one and two because around here the College use form three; instead of year seven and eight because it's a lot harder to trace back. You start stumbling over a Year 13 or whatever.

So that's the background and there's a lot of um, agitation and movement from people from Kaukapakapa and Silverdale to get into our area, in our zone, in our catchment area that we've got at the moment. They want to get here but they also want to get to Rangitoto and they're doing all sorts of things and there's machinations going on with manipulating zones. So these could all impact on the Middle School and, a 1-7 school would impact very much on Long Bay College because that's the school at the end of the – the end of the city area – there is no more city. Long Bay is past the end of the city and that's the whole of the Auckland peninsular, the northern most urban area.

So, it is very difficult for a school where there are no houses in the 180 degrees on one side of it. There are so many variables around here but, I mean, we could cope if we reduced our zone – if we took out our fee-payers we could, so there's no need for a Middle School. So that's really the background.”

B Hinchco: “Your background in Intermediate education?”

T Rowse: “Goes back for forty years.

Actually, I have written some notes here.. can you turn that off for a moment?

I spent the first seven years at Primary School because that was the way it was. – I'd never have put a Beginning Teacher in Intermediate School unless there were unusual circumstances. Most Beginning Teachers started at Primary. They should have five years' experience before Intermediate, but I went to Matamata, hardly the country – and, um, went to Intermediate, and I was just stunned by the way the school ran, the amount of tradition that they had at this school and the amount of activity. You know, the number of people that were working towards the good of the school, compared with the primary schools where I had been where everyone just looked after their own age group. All of sudden there were all of these people driving and creating school events, because all of the children were at the same level, Productions, Speech competitions, everybody in the school seemed to be involved in some way to develop these things whereas at the

Primary school the teachers in the new entrant classes didn't do anything in the whole school concept.

It would be an exceptional standard one teacher that was involved in other activities. I took such activities as soccer and softball.

This is the way I thought it should be but the other primary teachers didn't do much, as a consequence the level of activity in Primary School that I was involved with was probably a tenth of the Intermediate. I was captivated right away in an intermediate.

After three years there I came back to Auckland and after that spent very, very little time apart from two Principal's jobs back in Primary schools and in those Principal's jobs I was absolutely bored particularly compared with what I was in intermediates. I found that I could not make life zing along. So I came back here and spent time at Auckland Normal Intermediate, and found there is a huge range of activities going on, mathematics and its just brilliant here, as we got bigger and bigger the net of activities has just got wider and wider and some days there is a bewildering for kids the choices that they have got. It is so much easier in Auckland. Our school is the only school on the North Shore to go to the Grand Finals, following the North Shore Zone Championships, and has done so for the last eight years, We've two levels for every sport and we have twenty-six sports and every level is catered for and every elective is catered for. We have two levels of competition for each sport, and we cope. It is too hard for the local 1-7 schools, Carmel, Rosmini and Kristin to cope. And, you know, the research has proved it that, intermediate schools teachers really get involved with these children. They provide the skills, you know, that are pretty hard to pick up when you get to eighteen or nineteen.

[The two years of intermediate have the full focus of the total staff and facilities. Perhaps a separate Y9/Y10 school would be a good idea too- to focus on their special needs.]

Even at the awkward stage of fifteen and sixteen year olds, they do not have the organization, they haven't got the specific facilities that we have got, I am not arguing against middle schools at this stage I'm arguing against schools that have got um Primer One to Form seven, or ah from one to seven, they do not have the specific facilities, we have had kids coming back here because they cannot get inspired. They say that they can't get access to anything. And we ask "Why?" They cannot offer a year eight softball team because they don't have the numbers, they cannot use the Gym because a school certificate class is using it and that's been my observation with those schools.

The specialisation of Middle schools, the last thing I would ever want to see would be one to seven for that reason. I have seen over a period of years over fifty years...

B.Hinchco It has gone very quickly hasn't it?

T. Rowse Yes.

I've seen, you know, I see the neglect of Forms one and two in one to seven schools. Unless you are in some country schools where they have some sort of system where the Principal sets up the form seven will look after the form ones and coach and get involved and you have a better system where the younger children are looked after as they come through the system, and are looked after at that level.

Which is what I did when I went to my first primary school as the Principal, I concentrated on the standard ones using bigger kids to develop those skills. In turn those skills started to permeate right through the school and that school was four years after I left was the dominant Primary school in sport where it hadn't been before because the little guys had excelled, the little guys were involved, the little guys had reached the top. They went back to help, when they got bigger they were happy to go back and help because that had been what they had been taught they should do. You know, every kid has the need to have responsibility; you and I know about responsibility, that every kid needs responsibility or a place in the system.

[If I had been in a sole-charge I may have run the primary school better- my Intermediate years worked against me.]

The biggest problem in a school of a thousand kids is that there are not enough responsibilities and you have to create, the broken crayon monitor, the window monitor, the seat monitor, the text book monitor, you do your job just, you have a job a smaller job but you have to do it really well.

One of the things I like about Intermediate schools is that in the first year we concentrate very much on skills and we facilitate learning while they are still over awed and the second year we do what educators believe, we make them independant and we get them to experiment and to go for it and to prepare for college, and I think we do that really well and we also do everything else in a two year spell, we do production one year, and do a concert the next year and so on. Science Fair one year and Technology in the next year. Every year we have gone through and I think you have to drive it and demonstrate what can be done that we have to work so hard to get the same, to achieve the level in two years.

I think we would probably only get to that same level in four years because it would take the urgency out of the goals. A teacher says I am not going to miss band practice on Friday, I am going to be there, and I am going to be the best. I don't want no other thing to interrupt my programme because otherwise these other things come along. He knows that he hasn't got plenty of time, he knows

that he has only two years, and he has to do it, and at the end of that time the band will be ready. If it was four years, that's how long it would take. [Our band man really works hard and achieves miracles in two years. In a 3 or 4 year programme he would be able to ease back- not a good idea. The greenhouse effect.

I think the two years does, does get a bit of urgency to it. I.. It was actually quite interesting because, you know the um, I reckon that Intermediates are so driven by economic matters, like in 1932 when they made them official because really the authorities, Government, never did what they were intended to do they, they did it because it was expedient for the economy at that stage, Kowhai was supposed to be a three year course, leading to them going off to work.

I have been just about fifty years in intermediates, and over that time have seen many changes.

B.Hinchco You are an expert on intermediate schools

T.Rowse Not an expert I haven't really done that much research.. though I believe that we have in year eight some brilliant kids who um, go back into College and are almost put back to the Primer level, you know, they are idealistic, challenging and affectionate and they can identify with, if they get the right teacher you can take them to the heights that you can't believe as a classroom teacher. I think the research has shown how the classroom teacher's impact is so strong, if it is a good influence. If you get an expert teacher who can teach the whole class then you really have something special. And we have two or three of these top people.

They put up the goals for the lesson and they discuss these goals and they put them down in their books and they mark according to that and regardless of that they will raise money, they will be the best at sports they will.. if you walk out the noise level would be the same, the working level wouldn't change, they are working you know, and the teacher works individually with them, that's the ultimate I believe.

I hate to see our kids get buried in a form one to seven.

Now all the local Principals talk about the fourth formers as being the lost, these would be the kids we would have if we had a four year middle school, they would be the top of our school. Well I hate to think that they would actually be the role models I want although they, they might well be if they are the top of the school. The school should have a camp, half the school goes Feb to June, the other June to Nov. They could be based in the city for six months. They camp there and then they do service and sports and other things and then they have a sort of physical, hands on like everybody's' supposed to have, you know, that's a year and then the next year they go into an exam mode, but they don't have to spend another year like the third former does. So often the third form arrives at a new school and it is all lovely then the fourth formers are pains and then fifth form is School Cert,

sixth form the top of the school, big guys running the place with the seventh formers, every body has a role except the fourth formers.

[Form four would be active/service/hands on/farming or working. This seems like a good argument for F1 to F4 but then the F2's would be the lost children.]

Maybe a middle school would do that, but I worry about putting the big kids with the younger girls, the girls are so.. these days, so mature these days. If you have a girl two years younger than the fellow, you know, the trouble could start, but I haven't enough research to support that. I wouldn't want fourth formers at the top of the school, I think that they need the role models of the seventh formers.

Every body needs a role model, even in a two-year cycle. In a two-year cycle the form one, there are influential people in your school even though they don't think they are, they are still affected by them. It is great to have those two year classes and having those role models and they aspire to copy that kid in year eight.

A couple of years ago I spoke to that rat bag kid that I thought was a year eight and I said to him "What do you want to do next year?" and he didn't say and I said "What school are you going to next year?" and he said, "I want to stay here," and I said "Well you can't" and he said "I thought I could stay and do year eight here." And I said, "What year are you know?" "Year Seven" so I said "Who do want to be like next year?" "I want to be like Owen." And the next year he was Owen, he had role modelled so successfully that there he was and he changed from the ratbag, he wasn't a pillar of society, but he made it.

I suppose we could get form four role models, not so strong, or keen.

Roll, roll, roll growth will stop North Shore Intermediates going into Middle Schools. They make me We have so much to think about to consider middle schools. But if I had to go that way I would actually see a more natural progression to go for year sixes with the year sevens because they don't have the same negative, the college level is up a whole different level of maturity, whole different level of independence. A three- year programme would set well alongside the two-year cycle. [Three year Y6,Y7,Y8 more natural. Maybe spoil primary school programmes.]

[Many students make an excellent fresh start in intermediate schools. Others get a scholastic boost.]

The ones most "middle schools" attracted back were the third formers, the ones that no one really wanted the ones that caused the problems at school. That happened a little at Clover Park, I have been to Clover Park a couple times. I would rather have year six, every time a school appears to drop off roll they seem to go to a middle school, I'm not saying that is the only thing, but the lack of space stops you from thinking about a middle school.

In the case of a roll drop we have to be careful in when we start pilfering kids when some of these really good colleges, like my son-in-law's he is the headmaster at Auckland Grammar. Now imagine if he said I'm going to start a one to seven school and that would be the end of it. Normal Intermediate, Remuera Intermediate, they would just disappear because no-one would want to be there. Hard enough actually to be at Remuera Intermediate or Normal because there are so many private schools around there doing very, very well. Its very frustrating. We never lose our top kids to private schools because they are too far away. Kristin is too expensive and not attractive enough school.

If you told Rangitoto College that we were starting a one to seven school they would be in desperate straits because it would be attractive. I think I could drag a couple of hundred kids out of the local Primary Schools at the year six level and they wouldn't be able to fight back, even if they recapitated. I'm not saying that I would ever do that but I think about it that way. It would become very complicated. Don't get colleagues "attacking" our roll numbers.

So you better ask your questions. I feel that they should be independent and not put into College and anything is better than a College education for these kids. I don't care whether it is intermediate or a middle school or any other alternative and form one to four seems a pretty good group in terms of David's studies. [I believe in classroom teachers, not specialisation for Y7/8. I like specialisation in sports, activities, by teachers in their "spare time".]

We couldn't do the alternative programme such as they do at Ponsonby or Belmont where they do a sort of College programme in the afternoons or something of that and everybody takes a home class in the morning, um I suppose we could do it but it would be a, we would have to restructure the school with one half having technology in the morning and the other would in the afternoon, it would be too hard to organise although John is brilliant with organization and I'm sure he could do it. With the right organization I'm sure you could do it, but it would not be worth it.. The size of the school really um, changes a lot of things you do. When you get to a thousand you have to become a lot more formal.

B. Hinchco Nationally, what do think has been driving the Middle School movement?

T. Rowse I'd be arrogant if I said roll loss/growth, but I don't know. For some of them roll growth has been part of the reason, for others their own beliefs, for others that it would be good for this age group. I just have reservations about the politics of the movement. There are a few empire builders, but I think most of them believe that middle schools are good for kids. I know that, there are the odd sort of buccaneer Principal who are out there for their own purpose but most of them these days have done it for the right reasons. You have got the tiger by the tail with this answer. It just gets bigger and bigger.

I can't lecture, Brian, We're lucky being in a school like this, with such huge roll growth. I have plenty of property; the only problem with property is where to put it. I have upgraded everything, we have done everything we have wanted, it has been a golden eighteen years, absolutely.

I'd wish it on everybody, we all need this, we would never have wanted to stop teaching..

There are genuine people I think that are driving the Middle School movement in New Zealand.

B.Hinchco Are there weaknesses, do you think, in the Intermediate structure, because you have had experience of Primary schools as well as Intermediates. Are there weaknesses they are not addressing?

T. Rowse Yeah, I think that people get into um, a mind set about teaching styles that the children can set there and will just work.[Starting in intermediate schools is bad for young teachers.] That probably every intermediate teacher really, if you go back to what I said earlier, needs five years in the Primary School before they start at intermediate. If I was going to make a rule I would bring back country service encouragement. I wouldn't support it for everyone no, but I would make it, I would find some way to get it back in. I think country service did people a lot of good.

I don't know how you work it in with the union, but idealistically I would like to see that brought in. Four or five years in intermediates, after four or five years in the country, or four or five years in Primary then go back to intermediate. This would help your career, you would have done your basic thing then you could choose where you want to go. The problem at the moment is there is no career structure.

I've got teachers here who have lost their careers as they have worked out that they are not going to get a responsibility. I think a career structure would motivate them. I first taught at Normal Intermediate the first days after I was there, we said our jobs for this year, well they were all falling over themselves, "I'll do athletics", "I'll do this," "I'll do that", Why were they all so keen? They were all going for grading. They were going for grading next year and they made sure that they had got all the things they need. This was quite a good thing because people were very conscious of what they needed to do to get themselves on and then when they got involved in it. They kept doing it, success lead to more success. Then if we, they had to go on strike, then maybe the alternative then of going on strike they could withdraw their services from the voluntary stuff you were doing before.

[People say two years is too short for a school. For young people, two years is along time – a long and busy time.]

I know it costs parents a lot of money at intermediate school. I think that a good intermediate school you get the advantages however.

[Those teachers who learn to teach have, generally speaking, learned to teach in primary schools where students do not just sit there and listen. Too many teachers have spent so much time at Intermediate level that they try to teach like college teachers. I think a four-year school would aggravate this trend.]

I think that not every teacher who has aspired to come to intermediate school is actually very good at it. A lot of people who have the personality and work quite well with this level of kids tend to really have a lot of control and tend to dominate them which hopefully, which we're trying to get rid of, they are a contradiction, they say "Do as I say" which works against the way we want the kids to be great.

Others have a never say "no" philosophy, they never say "No", If I ask you something they never say No you see, they say "tell me more?", "How are you going to do that?" Talk to them, you know, if the idea is no good they will tell you. They can't know straight away, you've got to very very unhappy customer which, as you and I know, defeats the purpose.

Am I answering your question?

B. Hinchco Yes , yes certainly

T. Rowse Well I have been around long enough, If I can't answer them who can. I am not giving the answer, you know there are a lot of other answers. You are welcome to take these thoughts away and use them.

## **Appendix F: Letter of Introduction to Principal Interviewees**

Dear

As part of my Doctoral research into Middle Schools and Middle Schooling in New Zealand I would like the opportunity to interview you on this topic. As a Principal of a New Zealand Intermediate School who has been opposed to the Middle School movement your insights would be of value to my research.

My doctoral research centres on the issue of to what extent the move to a Middle School structure is a move generated by pedagogical beliefs and issues and to what extent it is a politically motivated move. The academic readings suggest that there is a gap between the rhetoric espoused by those advocating a change of school class and the realities of what needs to occur to ensure that a change happens.

The purpose of the interview I wish to have with you is in the nature of a case study through which I can explore these theoretical issues in a practical situation.

I would like to carry out a one hour taped interview with you at a time of your convenience some time in the next month. The tapes will then be transcribed and a copy of the transcription made available to you for your comment. At each step in the research process I will make available to you any written material that mentions your comments and that of your school for your approval prior to its use.

Throughout the research you may select to be referred to by name and the name of your school, or you may prefer to have references made via pseudonym, which I can arrange. As there are aspects of this interview process that may impact on current people and events if you require full anonymity can be guaranteed. If at any time you wish to withdraw from this study that is also guaranteed.

It is my intention to use this research material as part of my doctorate. This may also include a number of subsequent presentations and papers.

If you consent to take part in this research project please sign the attached consent form and return in the enclosed stamped addressed envelope.

## **Appendix G: Consent Form**

I understand that the purpose of this study is to collect research data on Middle Schools as part of a doctoral thesis.

I consent to take part in a tape-recorded interview with Brian Hinchco on the topic of Middle Schools and my thoughts and opinions on this issue.

I understand that any information collected about myself and my school remains confidential to the researcher and myself. However, should specific information be required for professional presentations or academic publications pseudonyms to protect identity will be used unless I specify otherwise.

I am also aware that I can withdraw from this study at any time. I also understand that I have the right not to answer any questions if I so choose.

NAME  
SIGNED  
Date.....

Preferred Date and Time for the interview.....

B.Hinchco  
Principal  
Mokoia Intermediate School

## **Appendix H: Letter of Introduction to Boards of Trustees**

Dear Chairperson

As part of my Doctoral research into Middle Schools and Middle Schooling in New Zealand I would like the opportunity to interview your school's Principal on this topic.

My Doctoral research centres on examining the extent to which the move to a Middle School structure is generated by either pedagogical beliefs and issues or it is a politically motivated move. The academic literature suggest that there is a gap between the rhetoric espoused by those advocating a change of school class "status" and the realities of what needs to occur to ensure that a change happens. The purpose of this interview is to assist me to develop a case study through which I can explore these theoretical issues in a practical context.

I will be undertaking four such interviews; two interviews with Principals who have led their institutions through the change from Intermediate School to Middle School, and two with Principals who have been opposed to the Middle School concept. These interviews will allow me to compare different beliefs and motivations.

Throughout the research the Principals will be able to choose either to be named or be referred to by pseudonym. As there are aspects of the research and interview process that may impact on current people and events, full anonymity can be guaranteed, if this is required.

If you require further information then please do not hesitate to contact me to clarify any matters.

Yours sincerely

Brian Hinchco.

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## **Appendix I: Suggested Interview Questions**

[1] Please outline the process required to effect a change of class from Intermediate to Middle school status?

[2] What educational factors played a role in encouraging you to undertake this change of class?

[3] Were there particular aspects of this change of class that were “political” in nature? This may include particular people, processes, letters or climates that surrounded your school’s particular change of class.

[4] To what extent do you believe the change of class to Middle School is a pedagogically sound process to undertake?

[5] Which, if any, educational theorists influenced your thoughts on Middle School structures? In what ways did they influence your thinking.

[6] Were there other factors that influenced the change of class in your school? (Such as visitors to your school, involvement in international conferences, etc)

[7] Which Middle School structures have you developed at your school?

[8] Please outline the distinction you believe to exist between middle schooling and Middle Schools?

For the Principals opposed to forming middle schools these questions will be reformatted to take into account this differing approach to the topic.