

5-8 Study Work Group Interim Report



June 30, 2014

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5-8 Study Work Group Members

Gloria Hancock	Assistant to the Superintendent for Curriculum, Instruction and Assessment
Geeta Heble	Director of Arts and Humanities
David Geanette	Director, Math, Science & Technology
Pam Haggerty	Reading Specialist - Elementary
Mary Beth Tecce	Staff Developer/Data Specialist – Elementary
Jennifer Tesno	Academic Coach Mathematics/ELA

Elementary

Judy Brown	Principal, Joseph Ferderbar Elementary
Stephanie Miguelez	Principal, Pearl Buck Elementary
Andre Modica	Principal, Samuel Everitt Elementary
Kati Burke	Teacher, Lower Southampton Elementary
Suzy Rittler	Teacher, Albert Schweitzer Elementary
Dawn Toth	Teacher, Samuel Everitt Elementary
Cindy Connolly	Guidance Counselor, Walter Miller Elementary
Giuliana Sophy	Guidance Counselor, Samuel Everitt Elementary

Secondary

Derek Albarran	Assistant Principal, Carl Sandburg Middle
Joann Holland	Principal, Poquessing Middle
Andy Sokol	Principal, Maple Point Middle
Clarke Stoneback	Assistant Principal, Poquessing Middle
Bonnie Anderson	Teacher, Maple Point Middle
Lea Barr	Teacher, Carl Sandburg Middle
Denise Brad	Learning Support Teacher, Poquessing Middle
Thomas Brown	Teacher, Poquessing Middle
Jen Emrich	Special Education Teacher, Maple Point Middle
Carol Foley	Teacher, Maple Point Middle
Neil French	Teacher, Maple Point Middle
Janine Kearns	Reading Specialist, Maple Point Middle
James Pecuch	Teacher, Poquessing Middle
Joe Pimble	Teacher, Neshaminy High School
Sharon Pulford	Teacher, Poquessing Middle
Beth Sanchez	Teacher, Carl Sandburg Middle
Connie Welke	Teacher, Carl Sandburg Middle

Parent/Community

Karen Blumenfeld	Parent, Pearl Buck Elementary
Michelle DiCesare	Parent, Joseph Ferderbar Elementary
Christy Dougherty	Parent, Samuel Everitt Elementary
Brenda Karaburk	Parent, Samuel Everitt Elementary
Michelle McIntyre	Parent, Samuel Everitt Elementary

5-8 Study Work Group Interim Report

Background & Overview:

The impetus for moving 5th grade to the middle school to create a 5-8 grade level configuration was to address middle school capacity issues due to declining enrollment, to facilitate restructuring of resources, to improve the delivery of middle school education due to a significant organization structural void that was left when the District moved from a 6-9 to a 6-8 grade level configuration, to address budgetary constraints and to make the most efficient use of the District's buildings given this status.

In February 2014, the Neshaminy School Board of Directors requested the administration, led by Superintendent Copeland, to examine the feasibility of implementing a 5-8 grade level configuration for the 2014-15 school year. The administration spent the month of March researching and developing a plan of action. Between March 3 and March 10, 2014 the Office of Curriculum, Instruction & Assessment staff conducted telephone interviews (Upper Merion, Wilson Area Intermediate, Tredyffrin/Easttown, Fleetwood & Williams), online reviews of selected neighboring middle schools with similar school profiles and a 5-8 grade level configuration and one on-site visit; (Wilson Area Intermediate School). The list below represents those high performing neighboring schools with a 5-8 middle school grade configuration:

- Sandy Run Middle School in Upper Dublin (93.5)
- David E. Williams Middle School in Montour School District (92.6)
- Wilson Area Intermediate School in Wilson Area School District (89.5)
- Fleetwood Middle School in Fleetwood Area School District (89.5)
- Fairview Middle School in Fairview School District (86.7)
- Upper Merion Area Middle School in Upper Merion School District (86.3)
- Tredyffrin/Easttown Middle School, Tredyffrin Easttown School District (96.2)

Summary notes from the telephone interviews and the online reviews are contained in the appendices.

Preliminary data collection work was also undertaken by Dr. Hancock, Dr. Heble, Director of Arts and Humanities and Mr. David Geanette, Director, Math, Science & Technology in terms of existing program offerings, external 5-8 models and very early thinking about potential core components based on best practices. The preliminary analysis of these three components is included in the appendices.

During the period of data collection work, Superintendent Copeland and Dr. Hancock, Assistant to the Superintendent for Curriculum, Instruction & Assessment, conducted an on-site visit to the Upper Merion Area Middle School on March 10, 2014. They have had a 5-8 model since 1982; hence they are at the forefront of this grade configuration and school transition to middle school.

When asked about the challenges faced, they responded, "Getting over our fears in general about 5th graders in middle schools." Regarding the opportunities, they said, "To look at not just expanded education programming and clubs and activities, but to review the entire middle school program of education and increase academic rigor and students' social emotional learning."

A tour of the school afforded the Superintendent and Dr. Hancock an opportunity to interact with the students, parents and teachers. All of them are very pleased with their 5-8 school and were able to give concrete responses. The Upper Merion School District extended an invitation afterwards to have team of Neshaminy teachers, principals, parents and students visit their school for the day.

During the March 18, 2014, School Board of Directors meeting, Superintendent Copeland reported that while the administration was capable of implementing a 5-8 grade configuration in the 2014-15 school year, given the magnitude of this concept and scope of work, further development and transition time for it to be successful should be carefully considered. He recommended that a 5-8 Study Group comprised of the major stakeholders be convened to further develop a model and to provide recommendations for the Board's consideration by October 1, 2014.

Subsequently the School Board of Directors devoted several public work sessions, board meetings and hearings to this topic in order to provide multiple opportunities for public input.

The School Board of Directors was unanimous in its decision and support of a districtwide 5-8 Study Group and directed that the work of this group look beyond moving grade 5 up to the middle school by taking a comprehensive look at middle school education. Additionally, the Board delegated the on-going review of work products to the Educational Development Committee, chaired by Ms. Irene Boyle and supported by members, Mr. Mark Shubin and Mr. Anthony Sposato.

On April 3, 2014, the 5-8 Study Work Group was convened. It is chaired by Dr. Gloria Hancock and is comprised of parents, teachers, and administrators (building level and central office).

The Charge:

Our collective charge was to review the research literature, assess 5-8 models in neighboring school districts, identify best practices and develop recommendations for a plan for potential implementation in the 2015-16 school year, subject to approval by the School Board of Directors.

Our inquiry focused on two key questions: What would an effective 5-8 middle school look like in Neshaminy? How do we improve middle school overall?

To make the work more manageable the work group decided to divide the work into two phases: Phase 1 - Information Gathering and Analysis with projected timeline for completion, June 30, 2014; Phase 2- Comprehensive set of recommendations developed with projected timeline for completion, October 1, 2014.

Launching the Study:

To assist the 5-8 Study Work Group in its work, the District engaged the services of three different experts in the field and shared the discussions with the broader school community through two evening public forums, two morning/afternoon work sessions and a broadcast on Neshaminy school station on Cable TV (Fios Channel 43 and Comcast Channel 28).

The first in a series of 5-8 middle school public forums was held on April 15, 2014, at 6:30 P.M., during the Educational Development Committee meeting. Our first guest speaker was Mr. John Adiletto, Assistant to the Superintendent, Upper Merion Area School District. Upper Merion has similar

demographics to Neshaminy and has implemented an effective 5-8 model since 1982. Mr. Adiletto shared his district's experience in transitioning from a traditional middle school model to a 5-8 middle school model. In addition to Mr. Adiletto, two guest speakers considered experts in the field were tapped to further inform the work of this study group. They include: Dr. George P. White and Dr. Bena Kallick.

George White, Ed. D has over a decade of experience in public education, most notably at the middle grade level where he has served in a variety of roles—teacher, teacher team leader, assistant principal, principal and assistant superintendent. He currently serves as a professor in Education Leadership and as Director of the Lehigh Valley University Middle Level Partnership and leads the Center for Developing Urban Educational Leadership.

Dr. White has authored several publications and conducted numerous presentations on middle level students, middle grade education and successful restructuring of middle school programming.

Bena Kallick, Ph. D is a private consultant providing services to school districts, state departments of education, professional organizations, and public agencies throughout the United States and abroad. Dr. Kallick is well known nationally, as well as, internationally for her work in curriculum, instruction and assessment with an emphasis on organizational change. She has co-authored several scholarly works for the Association of Supervisors of Curriculum Development-ASCD) on *Assessment in the Learning Organization* (ASCD, 1998), the *Habits of Mind* series (ASCD, 2000), *Strategies for Self-Directed Learning* (Corwin Press, 2004), *Learning and Leading with Habits of Mind* (ASCD, 2008), *Habits of Mind Across the Curriculum* (ASCD, 2009) and *Using Curriculum Mapping and Assessment to Improve Student Learning* (Corwin Press, 2009). Her works have also been translated into Dutch, Chinese, Italian, Hebrew, Arabic, and Spanish.

Her work on cultivating and instilling *Habits of Mind*, which are the attitudes and dispositions adolescents need, not to “successfully prepare for a test, but how to prepare for the tests of life.” The Habits of Mind work has particular relevance for adolescents at the middle grade level which is a tumultuous time where academic, social-emotional, and physical developmental growth intersect and collide. This work focuses on understanding these young students' frame of reference so that a culture of learning and good character (citizen) traits can be built to best meet their needs holistically. It is being implemented in over 300 schools.

<http://www.nytimes.com/2007/05/12/education/12middle.html?pagewanted=all>

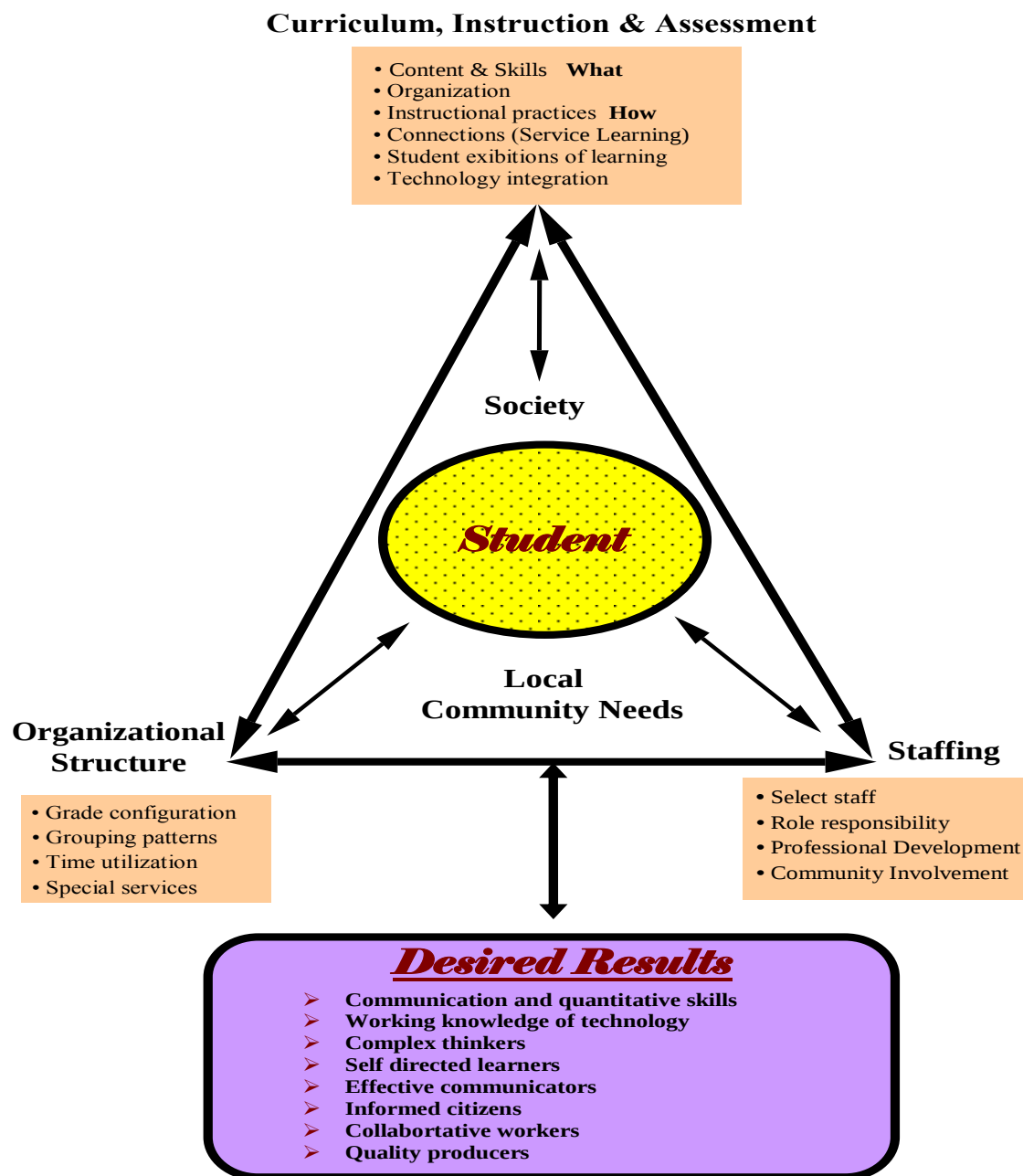
Dr. Kallick has also served over a decade at Fairfield University, as the Director of the Teacher Center and created an alternative high school and a children's museum that served as a lab for teacher development on new ways of teaching and learning.

In keeping with the Board of Directors March 18, 2014, charge to the administration to look beyond moving Grade 5 up, the 5-8 Study Group has met several times this year to look at the current middle school program offerings, examine which curricula and programs, structural components (e.g. staffing,

schedule, time allocation, etc.) and support works best for this student population and what would it look like to optimize everything we have in the district to support it?

On May 13, 2014, Dr. White and Dr. Kallick worked with the 5-8 Study Group on deepening understanding of adolescent development and implications for school design and the value and importance of this population developing habits of mind for school success and beyond. Copies of Mr. Adiletto's, Dr. White's and Dr. Kallick's PowerPoint presentations are included in the appendices.

The diagram provided below illustrates the study group discussions and areas of focus for Phase 1.



The 5-8 Study Work Group was broken down to smaller six-member action teams to begin to work on each of the major tasks as well as to identify non-negotiables necessary to complete the tasks:

- Synthesize the research
- Identify Effective Organization/Structures
- Professional Development
- Transition/Outreach Activities
- Program of Studies (Curricula)
- Internal/External School Visits

What the Research Says:

This literature review is based on peer-reviewed, empirical studies from the most recent decade. Although an attempt was made to locate research focused on fifth grade students, this type of study is rare due to the more prevalent middle school configuration of grades 6-8. Studies of older students, however, were useful in providing information on the persistence of transition effects and how effects may be related contextual factors.

Studies comparing students in middle schools with students of the same grade housed in elementary schools or K-8 schools have found that achievement test scores decline, attendance drops, and behavior problems increase after students' transition to middle school, whether the transition is at Grade 5, 6, or 7.¹ The negative transition effects on academic achievement, attendance, and behavior seem to be correlated to students' age at the transition to middle school, with significantly greater negative effects when the transition is at Grade 5 than Grade 6, and at Grade 6 than Grade 7.² Furthermore, negative middle school transition effects are not temporary, but persist into high school.³

Several middle school studies that found negative effects used K-8 schools as the comparison group, leading to the conclusion that the negative effects are related to the middle school grade configuration or transition rather than the exposure of younger Grade 5-6 students to older Grade 7-8 students. Furthermore, one study focused specifically on comparing the academic performance of fifth grade students in K-5 or K-6 elementary schools with Grade 5 or Grade 5-6 intermediate schools—all configurations without Grade 7-8 students. This study found fifth grade students in Grade 5 or 5-6 schools to have significantly lower math scores than students in elementary schools.⁴

¹ Philip J. Cook, et al., "The Negative Impacts of Starting Middle School in Sixth Grade," *Journal of Policy Analysis and Management* 27, 1 (2008): 104–121; Jonah E. Rockoff and Benjamin B. Lockwood, "Stuck in the Middle: Impacts of Grade Configuration in Public Schools," *Journal of Public Economics* 94 (2010): 1051–1061; Guido Schwerdt and Martin R. West, "The Impact of Grade Configurations on Student Outcomes Through Middle School and High School," *Journal of Public Economics* 97 (2013): 308–326.

² Jonah E. Rockoff and Benjamin B. Lockwood, (2010); Guido Schwerdt and Martin R. West, (2013).

³ Philip J. Cook, et al., (2008): 104–121; Guido Schwerdt and Martin R. West, (2013).

⁴ Philip J. Cook, et al., (2008); Jonah E. Rockoff and Benjamin B. Lockwood, (2010).

⁴ Julie P. Combs, et al., "Academic Achievement for Fifth-Grade Students in Elementary and Intermediate School Settings: Grade Span Configurations," *Current Issues in Education* 14, 1 (2011): Retrieved from <http://cie.asu.edu/>

The negative effects of student transitions to middle schools (or junior highs) have been reported since the 1990s; however, at that time it was argued that these effects were due to inappropriate pedagogical methodologies used by schools, rather than the grade configurations.⁵ To determine whether negative middle school effects were related to pedagogical factors rather than grade configuration, one study investigated conditions related to financial resources, class sizes, teacher quality, peer stability, incidence of tracking, and focus on math and English, finding that none of these differed significantly by grade configuration type.⁶ Another study found negative middle school effects to be unrelated to the use of teacher teaming or other educational practices.⁷

An understanding of contextual factors may assist in determining whether the findings related to middle school configurations may be generalized to specific populations. The district level factor most correlated with the negative effects of the middle school configuration was location, with an urban setting most significantly negative, followed by small towns and rural areas.⁸ The school level factor most correlated with negative effects was larger school size, having even greater impact on students of low socioeconomic status.⁹ Two additional studies found that larger grade level cohort sizes in middle schools were a significant contributing factor to the negative effects of middle school transitions,¹⁰ although a third study did not find correlations to cohort size.¹¹

At the student level, the differences in performance between students in elementary and middle school settings were unrelated to gender or socioeconomic status.¹² Academic achievement level was the main student level factor correlated to negative middle school effects, with significant negative effects on lower achieving students and no significant effect on higher achieving students.

According to the National Middle School Association which represents the nation's middle schools, there is a lack of empirical research available to answer the question, "What is the impact of moving 5th grade students to middle school?"

In fact, "most of the studies published to date on school transition target Grade 6 for the sample population and do not address the appropriateness of Grade 5 inclusion in elementary or middle schools" (NMSA research summary #8, Grade 5 in the middle school. Retrieved on February 25, 2014 from <http://www.ncmle.org/research%20summaris/ressum8.html>).

⁵ National Middle School Association, "NMSA Research Summary #8: Grade 5 in the Middle School," (1999) Retrieved from https://castl.duq.edu/conferences/Newmiddle/NMSA_Position.pdf

⁶ Jonah E. Rockoff and Benjamin B. Lockwood, (2010).

⁷ Guido Schwerdt and Martin R. West, (2013).

⁸ Guido Schwerdt and Martin R. West, (2013).

⁹ Thomas O. Erb, "Middle School Models Are Working In Many Grade Configurations to Boost Student Performance," *American Secondary Education* 34, 3 (Summer, 2006): 4-13.

¹⁰ Thomas O. Erb, (Summer, 2006); Jonah E. Rockoff and Benjamin B. Lockwood, (2010).

¹¹ Guido Schwerdt and Martin R. West, (2013).

¹² Phillip J. Cook, et. al, (2008); Jonah E. Rockoff and Benjamin B. Lockwood, (2010).

Similarly, the study by Cook (Duke University), Macoun (University of California, Berkley), Muschkin & Vigdor (Duke University) titled, "Should Sixth Grade be in Elementary or Middle School? An analysis of Grade Configuration and Student Behavior" examined disciplinary infraction rates and end of grade test scores for 6th grade and found the following:

- ✓ Higher rates of minor disciplinary infractions
- ✓ Moderate degree of violent and drug infractions
- ✓ A marked decline in end of grade test scores,

This may be attributable to a number of different variables, such as mechanisms by which grade configuration may influence students such as:

- Assignment to single teacher vs. assignment to a team of teachers
- Self-contained classes vs. switching classes
- Same group of students vs. between classroom groups of students;
- The degree of close teacher-student relationships (Cook et al, Working Paper Series 2007)

It is unfortunate that this study did not look at these and other related school factors.

However, these results do not rule out the logical possibility that the observed differences in 6th grade are partly due to differences in school reporting practices rather than actual behavior of the students. Nor do they rule out whether the elevated infraction rates are the result of problems resulting from a transition to a new school, or rather sustained over time. Additionally, the study did not follow these students behavior over time, rather for a single year.

While the study utilized sophisticated statistical methodologies such as regression (Binomial and Logit) analysis and match sampling, as is the case with all studies, there are limitations.

One of the primary limitations of this study is that it is not longitudinal, rather pseudo longitudinal, meaning it is not an experimental design inclusive of a control and treatment group over an extended period of time(one school year, 2000-01), nor does it provide for random assignment (match sampling). To measure impact, it must be measured against the control group and randomized; therefore the results are more "suggestive" and should not be generalized.

The goal of this particular research study and the goal of our proposal are very different. The research study goal is to analyze outcomes associated with middle school transitions and complementary end of grade test scores. Neshaminy's goal is to create a learning environment with developmentally responsive practices and programs that match our student's needs.

The demographics of the sample population as well as community protective and risk factors are very different. The research study takes place in North Carolina public middle schools drawing from rural to mid-size cities; majority of the students are youth of color, more than 50% are free and reduced lunch and less than 50% of the community holds a high school diploma

Conversely, Neshaminy is a diverse suburban community where the majority of the students are white, 20% free and reduced lunch and over 85% of the community holds a high school diploma or higher.

Access to educational resources and support services are less so in rural communities and cities than in suburban communities.

Lastly, the study concludes “our results suggest that the middle school configuration that brings 7th & 8th graders into regular (not defined) contact with 6th grades is problematic. And, whether the benefits to the 6th graders would be offset by the exposure effects on younger students is an open empirical question.”

In the final analysis, decisions about which grades are included in a school are very important and should be made carefully and supported with applicable evidence that examines the type of program and qualities of the learning environment, not grade organization as the key to successful experiences for 5th graders (Jenkins & McKewin, 1992; Epstein & Maclver, 1990).

Preliminary New Middle School Design Components:

What would an effective 5-8 middle school look like in Neshaminy? Core components such as a vision and philosophy would be the same, but varied in actual implementation to account for the differences in physical layout of each middle school building. The essential core components are noted in the table below.

Effective Organization	Structure	Program of Studies/Services
Vision & philosophy	Separate lunches with possible combinations of lunch/recess	Developmentally responsive program
Student centric	Extended learning blocks for ELA	Integrative curriculum
Teams for each grade with common planning time for teachers	One or two dedicated science labs to be shared by multiple grade levels-one natural/earth sciences and one physical science	Opportunities for peer leadership/mentoring
Maintain essential elements of an ES	Inquiry based, spiraling/integrative science program	Common assessments/grading policy
Physical segmentation of 5/6 from 7/8	Manageable team to student ratio (max of 125 students per team)	Adoption of Habits of Mind
5 th grade teachers instruct 5 th graders	Dedicated targeted intervention period for academics (remediation to enrichment)	Solid social emotional learning programs across the curriculum
Elementary schedule and a secondary schedule	Developmental Reading Program in Grades 6, 7 & 8	Assemblies to target MS level social needs/issues
Flexible start times for grades 5 & 6 and 7 & 8	Communication Program STEM	Wide variety of co-and extra-curricular activities
	Exploratory world languages	Access to adult advocate
		Counseling services with counselor looping with students
		Tutoring opportunities scheduled
		Late busing for after-school activities
		Summer reading program

How do we improve middle school overall? By adopting a vision and philosophy that is student centered and recognizes the unique needs of this student population supported with developmentally responsive programming.

Key Issues to be addressed:

The key issues to be addressed in the development of a set of comprehensive recommendations include the following:

- What will the program of studies be for students?
- How will time be allocated? What will the master schedule look like?
- What will the building look like? How will the programs of studies and organization structure impact the way space is used?
- What approach will be used to assess student performance?
- How will a smooth transition for students be accomplished?
- How will we staff the school (certifications, teacher assignments, teaming, etc.)?
- What role will parents play in the governance of the school?
- What professional development will the staff require to successfully implement the new program?

Recommendations:

The projected timeline for Phase 2—Development of Comprehensive set of recommendations is October 1, 2014.

APPENDICES

List of Appendices

- DRAFT Neshaminy School District Moving Grade 5 Up Timeline
- Preliminary Analysis of Internal Programs
- Preliminary Analysis of External Programs – Common Themes
- Preliminary Proposal for New Middle School Design Components
- Assessing Districts Using the 5-8 Grade Configuration
 - David E. Williams Middle School, Montour School District, Pittsburgh - Dom Salpeck, Principal
 - Fleetwood Area Middle School, Reading - Chris Redding, Principal
 - Wilson Area Intermediate School, Wilson Area School District - Tony Tarsi, Principal
 - Tredyffrin/Easttown Middle School - Mark Cataldi, Principal
 - Upper Merion Area Middle School - John Adiletto, Assistant Superintendent for Secondary Assessment and Improvement
- PowerPoint Presentations
 - Mr. John Adiletto – Upper Merion Area Middle School
 - Dr. George P. White – The Middle Level Learner Needs and Characteristics – Implications for What WE Should Do!
 - Dr. Bena Kallick – Building a School Culture for Learning