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Stories of Learning and Instructional Practices in Traditional Hawaiian Hula Education

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Walden University
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Abstract

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MLS, Regis University, 2001

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Dissertation Submitted in Partial Fulfillment

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Doctor of Philosophy

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Abstract

Teachers of traditional hula have preserved Native Hawaiian cultural knowledge despite societal changes that led to cultural suppression in Hawaii. However, little is known about how these teachers accomplished this feat. The purpose of this study was to understand how hula instruction has evolved to transmit cultural knowledge and how past methods influenced current instructor practices in sustaining a vibrant culture. Research questions explored the instructional approaches and innovations of hula teachers past and present in one traditional hula school. The conceptual framework integrated the Native Hawaiian worldview and a Western theory of participatory creativity. A qualitative study using Indigenous research methodology examined the perspectives of multiple generations of hula instructors connected by one hula teaching tradition, focusing on the past and present stories through archival records and interviews. Participants were three instructors connected to a master hula teacher born before 1932. Data sources were archival materials and interviews. Data were analyzed for thematic, structural, performative/dialogic, and visual aspects. Key findings revealed how instructors developed innovative methods to transmit cultural knowledge and skills that applied to life outside the halau. Innovative instruction included the use of technology and participation in competitive performance events to promote learning. Such learning not only perpetuates the Hawaiian culture but promotes a value system that may positively contribute to the continuation of cultural knowledge, values, health, and well-being of the individual, the community, and beyond.

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Dedication

This study is dedicated to my ancestors, who have lovingly guided me through this

journey and to my grandchildren, who love to hear stories.

Acknowledgments

I wish to thank all those who have helped me bring this study into being. First, I am indebted to the study participants whose stories brought their beloved teacher, known as Aunty, to life. I have had the good fortune to work with some remarkable people at Walden University. Many thanks to Dr. Cheri Toledo, my first committee chair and mentor, who helped me realize my research topic and never stopped believing in my work. Included with that first committee was Dr. Narjis Hyder, whose patience and calm demeanor contributed to keeping me on track. Thank you for your support. Special thanks to Dr. Gladys Arome for assuming responsibilities as committee chair despite her busy schedule and willingness to see me to the finish line. Also, I deeply appreciate the support of committee member Dr. Asoka Jayasena, who provided me with prompt and insightful feedback on many chapter drafts. I wish to thank Maile Loo-Ching and her amazing staff at Hula Preservation Society for their help and support. Mahalo nui loa! Several others aided me by reading chapter drafts and offering suggestions—Lisa Kahookele, Dr. Carolyn Mears, and Kumu Hula Meleana Manuel. Thank you all for sharing your unique perspectives and encouragement. Finally, I am grateful for the support of my family, especially my husband Jim, who encouraged me to follow my dream. I thank you with deepest gratitude and aloha.

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Chapter 1: Introduction to the Study

Introduction

Dance, along with dance instruction, occurs in diverse settings such as private studios (Berg, 2017), community-based programs (Leaf & Ngo, 2020), dance companies (Weber et al., 2017), preschools (Karin & Nordin-Bates, 2020), K-12 schools (Leandro et al., 2018; Li et al., 2018), and institutions of higher learning (Andersen, 2018; Ohlberg, 2020). Dance education is a global learning activity (Heyang & Martin, 2020) that involves students of all ages (Fortin, 2018). "Dance education incorporates learning in, through and about dance" (Rowe et al., 2018, p. 93). Despite the pervasiveness of dance as a human activity, the recognition of dance education as a knowledge domain is limited.

This study aims to contribute knowledge to the field of learning, instruction, and innovation by increasing awareness of learning and instruction of traditional Hawaiian dance, or *hula*, as communicated through the voices of Indigenous Native Hawaiian master dance educators. In Chapter 1, I introduce the study, provide the background, give an overview of the methodology, and identify the purpose of the study. I then provide the scope of the study, the conceptual framework, and the significance of the study.

Background

The field of dance is widely misunderstood at a societal level (Wilson & Moffett, 2017). This lack of understanding has resulted in the marginalization of dance education in education systems (Rowe et al., 2018), which has been felt by dance teachers (Rafferty & Stanton, 2017), students (Prichard, 2017), and artists (Chow, 2018; Fitzgerald, 2017).

With such marginalization, there are beliefs and perceptions that dance education does not benefit academic or cognitive development (LaMotte, 2018) and that the scientific knowledge domains are more important (Mabingo et al., 2020). Rowe et al. (2018) conducted a crowdsourcing study that involved 23 international dance education scholars. The researchers found that dance education is influenced by the political climates of nations. Respondents indicated that exclusion of dance education is the result of not only conservativism and traditionalism but also cultural values like competition and identity-construction (Rowe et al., 2018).

Problem Statement

The problem addressed in this qualitative study is that policies that have influenced learning and instruction practices have excluded Indigenous perspectives (Kana'iaupuni et al., 2017). Mabingo (2019c) noted that Western forms of dance education reflected postcolonial practices limiting access to learning about the Indigenous culture and knowledge-embedded context of the movements. The result was the loss of Indigenous language as a medium to transmit culture. For the Native Hawaiians, such effects have been far-reaching. Ka'opua et al. (2016) described this state as a form of cultural erasure that denied traditional Indigenous language, culture, and knowledge in the classroom. Kaholokula et al. (2018), as well as Kana'iaupuni et al. (2017), noted that centuries of colonization by other nations have led to sociocultural and economic marginalization of the Hawaiian culture and its people. When compared to other ethnic groups, Native Hawaiians are among the lowest in health and life expectancy (Kaholokula et al., 2018; Yang et al., 2019). Therefore, hula remains a vital and creative

art form that preserves cultural values and promotes identity development via movement (Rowe, 2008). Teachers who transmitted the knowledge of the hula tradition played a critical role in preserving cultural values. However, little is known about these teachers and how this transmission process occurred.

Skills for the 21st century may provide citizens with a greater sense of autonomy and the ability to serve their communities, locally and abroad. Indigenous communities have sought innovative ways to educate students in global knowledge as well as sustain their cultural identity (Ericson, 2017). Such approaches, in the form of innovative curricula and teaching strategies, recognize the value of both Western and Indigenous education as a third space of confluence between worldviews (Babha, 1994; Denning, 2002; Tamaira, 2018). In this space, Indigenous innovation is the conduit for learning that is inclusive of both worldviews.

Purpose of the Study

The purpose of this qualitative study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. This study explored the Indigenous teaching and learning practices through the voices of Native Hawaiian teachers, past and present, from traditional hula schools, or *hālau*. To achieve this goal, I identified three specific activities for this qualitative study. First, I explored the historical perspectives and instructional practices of Native Hawaiian kumu hula through archival records; specifically, this aspect focused on the practices of one kumu hula born before 1932. Second, I explored how the legacy of kumu hula instructional approaches was

transmitted to their protégés. Last, I explored the historical learning and instructional practices that could be considered innovative.

Research Questions

RQ: How have instructors, connected through a traditional hula school, approached instruction?

Sub-question 1: What are the key instructional practices represented in the stories of one kumu hula born before 1932 that transmit the Indigenous culture?

Sub-question 2: What are the key instructional practices of the current hula instructors?

Sub-question 3: How do current hula instructors believe they may alter their instructional practices based on a knowledge of the stories shared by the kumu hula born before 1932?

Conceptual Framework

This study of the instructional practices of master hula teachers used concepts and ideas that align with both Indigenous and Western worldviews.Triangulation of meaning (Meyer, 2008) is a lens to describe and interpret Indigenous Hawaiian ways of knowing, being, and doing. This worldview reflects a cultural belief that individuals gain knowledge through the experience of body, mind, and spirit. The framework of participatory creativity (Clapp, 2017) is a Western view of creativity and was used to explore the learning and instructional practices of kumu hula. Clapp (2017) proposed that creativity is the result of collective endeavors that are purposeful, dynamic, multifaceted, and continuous.

For this study, I used a conceptual framework that integrates these theories. This confluence of knowledge and ideas results in the creation of a dynamic space between Western and Indigenous Hawaiian worldviews. An appropriate metaphor in Hawaiian for this common ground is the ʻae kai (Tamaira, 2018), the space where land and sea meet. In this space, neither worldview predominates but interact to create a new space where innovation happens. Therefore, the triangulation of meaning (Meyer, 2008) and participatory creativity (Clapp, 2017) together provided a means to understand the instructional approaches and practices of kumu hula situated in the ʻae kai. Also, this framework helped to explain instructional practices considered innovative.

Nature of the Study

This qualitative inquiry examined the learning and instructional practices of Indigenous Native Hawaiian teachers, past and present, from a traditional hula school. The purpose of this qualitative study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. This understanding is essential because societal changes reflected the predominant Western culture without consideration of Indigenous Native Hawaiian ways of knowing, being, and doing. These resulting tensions between Western and Indigenous Hawaiian perspectives have influenced what and how Native Hawaiian teachers instructed to perpetuate their cultural traditions (Imada, 2012; Kaeppler, 1993/1996, 2004). In this study, I ultimately sought to reveal the historical hula learning and instructional practices that might be considered innovative in the current practices of the kumu hula.

Given the temporal nature of this topic and central research question, I proposed a qualitative inquiry approach that involved Indigenous research methodology (Adams, 2018; Datta, 2018b; Kovach, 2019; Smith, 2012). Indigenous research methodology is defined as a paradigmatic approach that reflects the Indigenous worldview (Kovach, 2019) and through specific research methods seeks ways to benefit Indigenous communities (Windchief & Ryan, 2019). This approach included the use of tools such as conversational interviews that are characteristic of narrative inquiry (Kovach, 2019).

I developed a narrative through field texts based on archival and interview research. As a participant-observer, I identified and studied the historical archival records of one kumu hula who was the founder of a traditional hula school. I examined and analyzed archival records at one archival site in the form of videos, audio recordings, photographs, and written documents to explore how this individual instructed to sustain hula and Hawaiian culture in the face of societal changes. I recruited and interviewed three teachers who were protegees of this founder. These interviews further expanded the narrative of innovation by describing instruction in the present. I collected data and created field texts from transcripts and a wide variety of archival formats, including written materials and multimedia materials.

To interpret these words and images, I relied on a narrative analysis model that applied to multiple texts and considered thematic, visual, structural, and performative/dialogic aspects. Given the vast array of data forms including interview transcripts, notes, journal entries, documents, photos, and video, I used eclectic coding (Saldana, 2016) for the first cycle and to determine the most appropriate method for the

subsequent coding. Eclectic coding is defined as a variant of open coding that allows the exploration of multiple data forms through the intentional use of several first cycle coding methods (Saldana, 2016). I hand coded, but due to the volume of data, relied mainly on QDA software in my analysis. I have considered issues of trustworthiness as part of my design. Ethical concerns are an issue throughout the research process. Although I identified potential issues before, during, and after data collection, I was sensitive to ongoing relational ethics and will exercised reflexivity. Although I closely followed IRB standards, I continually monitored the research in the process to ensure that participants and the information that they provide were protected. With IRB approval, I conducted data collection.

Definitions

This study included terms from the Hawaiian language that are relevant to the tradition of the hula. Pukui and Elbert (1986) commented that the Hawaiian language, because of it few phenomes, has more words with multiple meanings than almost any other language. To ensure the accuracy of terms, I have included the diacritical markings that occur in contemporary Hawaiian (Hopkins, 1992) such as the ʻokina (apostrophe = glottal stop) and kahakō (macron = longer sound) to the greatest extent possible throughout the text. In reading the participant stories detailed in Chapter 4, there are several noteworthy points. First, terms such as *aloha* have multiple meanings based on context. For this study, I have applied the most relevant meaning as detailed below. Second, nouns may indicate a singular or plural form. For example, the word *hālau*, depending on the context, may mean school or schools. Conversely, participants

occasionally pluralized Hawaiian words to conform to English grammar (i.e., saying

hālaus to mean schools). Third, to assist readers unfamiliar with the Hawaiian language,

participant quotes include bracketed English translations after Hawaiian words. Finally,

several English terms appear in this list to contextualize the meanings in this study.

'*Ae kai*: A "place where sea and land meet" (Pukui & Elbert, 1986. p.4).

Aloha: "The intelligence with which we meet life" (Meyer, 2008, p.10).

Hālau hula: A hula school (Imada, 2011; Kaholokula et al., 2018), often

expressed simply as hālau.

Ho'opa'a: Chanter/musician (Pukui, 1936/1980) in a hālau who memorized

poetic texts, as well as intonation, to accompany the dancers.

Hula: "Hula is a moving encyclopedia inscribed into the sinews and postures of

dancers' bodies. It carries forward the social and natural history, the religious beliefs, the

philosophy, the literature, and the scientific knowledge of the Hawaiian people." (Rowe,

2008, p. 31).

Indigenous worldview: Describes the worldview of a people whose ancestors were

the first inhabitants of a place (Cunningham & Stanley, 2003). Although Indigenous

knowledge systems are diverse (Huaman, 2015), common assumptions are that many

ways of knowing exist, humans have a relationship with the natural environment and that

finding meaning is a dynamic process (Adams, 2018).

Innovation: For this study, innovation is an interactive process between the

individual(s) and environment to intentionally create something new and useful.

(Kaufman, 2009). Although some researchers make a distinction between creativity and

innovation, I use these terms interchangeably. "Creativity is a distributed process of idea development that takes place over time and incorporates the contributions of a diverse network of actors, each of whom uniquely participate in the development of ideas in various ways" (Clapp, 2017, p. 7).

Kaona: Veiled language or hidden meanings. "Hawaiian poetry and song contain innuendoes, allusions, and metaphors purposely meant to conceal and reveal." (Imada, 2012, p. 18).

Kuleana: A cultural belief that it is a duty to share talents and skills that benefit all (Pukui & Elbert, 1986; Salis Reyes, 2019).

Kuahu: Altar maintained and dedicated to the hula deity, Laka, while the kumu hula instructed students (Stillman, 1998).

Kumu hula: Masters of traditional Hawaiian dance (Stillman, 2007) and described as "performers who had mastered an understanding of hula as a cultural system as well as a means of entertainment." (Stillman, 2001, p. 192). Kumu has other meanings, including the foundation, source, or main trunk of a tree (Pukui & Elbert, 1986).

Native Hawaiian: The Indigenous people of Hawaii. Used interchangeably with Indigenous Hawaiians, the Hawaiian people, or Hawaiian culture. For this study, I used the Federal Definition of Native Hawaiians as individuals who trace their ancestry in Hawaii before 1778 (20 U.S.C. § 7517, 2015; 42 U.S.C. § 3057k, 1987). The term "Hawaiian" in this study context should not be confused with individuals who are residents of Hawaii (Imada, 2012).

Talk story: Communication that is "free-flowing information-sharing through storytelling" (Kaholokula et al., 2018, p. 254).

'Ūniki: A traditional graduation ceremony that represents that "the knowledge was bound to the student" (Pukui & Elbert, 1986, p. 372).

Western worldview: Describes the predominant worldview that assumes knowledge (i.e., truth) is based on scientific evidence (Chhetri & Chhetri, 2015) using objectivity and logic to find meaning (Adams, 2018). Humans and nature are separate.

Assumptions

This study was based on several assumptions.

1. The archival collection selected represented a kumu hula who was widely known and respected in the hula community.

2. The interview participants were teachers connected with the kumu hula who founded one hula school. The records of this founder existed in the selected archival collection. My recruiting procedures automatically excluded teachers who did not fit this parameter.

3. The individuals interviewed were honest and willing to share their experiences.

Scope and Delimitations

The purpose of this qualitative study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. This qualitative study explored the Indigenous teaching and learning innovations through the voices of Native

Hawaiian teachers, past and present, from traditional hula schools, or *hālau*. The scope of this study was case-centered and was defined by the following boundaries. I used a purposive sampling approach to identify an archival collection of one hula teacher born before 1932. This individual was well-respected as knowledgeable in the Hawaiian community and left records to reflect teaching approaches and practices. In addition, this individual trained students as successor teachers. These successors or protegees were solicited to be potential interview participants. Although these participants were not geographically bound, the archive location was on a neighboring island in the state of Hawaii. Transferability was possible through a thick description of results from each data collection source that covered teaching and learning from the founder to protegee. The resulting narrative may assist others in developing narratives for other Indigenous groups or formal education systems. Also, this study may provide a method for Indigenous communities to explore their archives in a way that will promote awareness of their culture.

Limitations

The limitations of this study were factors beyond my control, including the number of protegee teachers available for interviews, the availability of archival records, and my remote location from these information sources. Other limitations were the operating hours of the archive and the restrictions on use and copying records. After COVID-19 restrictions forced the closure of the archive, I was unable to gain access to records until the organization found a way to make records available electronically. Since the archive remained closed to the public, I was unable to conduct on-site interviews with

the participants to view archival materials in person. Instead, the participants and I

viewed materials through Zoom. These limitations had an impact on my data collection.

Significance

The significance of this study revolved around three elements. The first was to

challenge the common assumption that Indigenous knowledge is static (Singh & Major,

2017). If knowledge is static, then there is no expectation that innovation exists to

advance knowledge. As a result, innovations created by Indigenous communities may

have been overlooked. By looking at the past, through oral histories, we may find

innovative approaches that we can apply to current instructional settings. The use of

Indigenous narratives may help to rediscover and recover the essence of such knowledge

that will benefit the community. Also, Indigenous archival research may serve as a means

of preserving knowledge, empowering communities, and promoting social change

(Ashie-Nikoi, 2021; Vaarzon-Morel et al., 2021).

Secondly, there is a gap in the literature of Native Hawaiian instruction in cultural

practices and innovation. Johnson and Beamer (2013) examined Indigenous Native

Hawaiian resilience narratives in music, dance, and stories. They noted that although

some research on Hawaiian health problems exists, there is a lack of studies about Native

Hawaiians and resilience. Since resilience in the form of self-efficacy contributes to

innovation (Bandura, 1995), there is a need to study the connection between Indigenous

narratives and innovation.

Finally, aside from the life history studies of two notable master hula teachers

who sought to preserve Hawaiian culture (Kaeppler, 2015) and a few studies describing

the choreographic productions of several hula contemporaries (Kaeppler, 2004; Shaka, 2015; Shay, 2016), there is scant knowledge about the instructional innovations of Indigenous Hawaiian teachers who teach hula in non-academic learning settings. Since no studies currently exist regarding kumu hula and instructional innovations, I am hoping that this study will contribute knowledge that may help to fill this research gap.

Summary

In this chapter, I introduced the study and provided the background on dance and dance education. I then summarized the problem of Native Hawaiian dance education as it is currently situated in society. An overview of the methodology followed, along with the purpose of the study. The scope of the study was addressed, as well as the conceptual framework and the significance of the study.

In Chapter 2, I will detail the conceptual framework and the research on dance, dance education, and the hula tradition. The existing literature provided a basis for this study and illustrates the research gap that exists regarding hula instructional practices.

Chapter 2: Literature Review

Introduction

Indigenous communities have sought innovative ways to educate students in global knowledge as well as sustain their cultural identity (Ericson, 2017). Such approaches, in the form of innovative curricula and teaching strategies, recognize the value of both Indigenous and Western education as a third space of confluence between worldviews (Babha, 1994; Denning, 2002; Tamaira, 2018). In this space, Indigenous instructional innovation becomes the conduit for learning that is inclusive of both worldviews. Indigenous innovations are evolving processes that sustain Indigenous ways of knowing (Huaman, 2015). In the context of Native Hawaiian culture, Denning (2002) expressed this common space using a metaphor as an undulating coastline, "an unresolved space where things can happen, where things can be made to happen. It is a space of transformation, it is a space of crossings" (p. 9). Tamaira (2018) expressed this as ʻae kai, meaning a "place where sea and land meet" (Pukui & Elbert, 1986. p.4).

This qualitative inquiry explored the learning and instructional practices of Indigenous Native Hawaiian teachers, past and present, from traditional hula schools, or *hālau*. The purpose of this qualitative study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. To achieve this goal, I identified three specific activities for this qualitative study. First, this study explored the historical perspectives and instructional practices of one Native Hawaiian master dance teacher, or *kumu hula*, through archival records. Second, this study explored how the

legacy of instructional approaches was transmitted to successors. Last, this research explored the historical learning and instructional practices considered innovative in the current practices of the kumu hula protégés.

Current studies show that Indigenous innovative instruction occurs in diverse academic settings. Mabingo (2019b) found that university students who learned neo-traditional dances in a study abroad program in Uganda deepened their awareness of Ugandan culture through collaborative teaching activities with a Ugandan teacher. In another study, Mabingo (2019c) taught Ugandan dances at NYU and found that students used reflection to integrate dances into their context. Chosa (2017), with the support of Arizona State University, created a summer youth program that connected tribal communities with Pueblo youth who lived outside of these communities. As a result, youth developed a stronger sense of belonging and helped them to learn ways to contribute to their community.

Such findings at a global level showed that Indigenous instructional innovations have led to increased student engagement and community connection. Studies of Hawaii schools that implemented innovative Hawaiian culture-based curricula showed similar benefits at the school level (Kana'iaupuni et al., 2017; Keehne et al., 2018) as well as in the individual classroom (Kaomea et al., 2019). However, aside from the life history studies of two notable master hula teachers who sought to preserve Hawaiian culture (Kaeppler, 2015) and a few studies describing the choreographic productions of several hula contemporaries (Kaeppler, 2004; Shaka, 2015; Shay, 2016), little is known about the

instructional innovations of Indigenous Hawaiian teachers who teach hula in non-academic learning settings, revealing a gap in the literature.

This chapter details the literature review conducted for this topic and builds a foundation of existing research on dance education as it relates to instructional innovations. In the first section, I describe how I conducted the literature review search, key search terms, and sources used. Next, I developed the proposed conceptual framework for this qualitative inquiry, including the history of the theory, the seminal researchers, key concepts, and relevance to this study. A literature review follows that substantiates the key concepts of instructional approaches and practices in dance education that connect to this study. These key concepts address current instructional approaches and practices through the following themes: global learning, cultural knowledge, instructional approaches, and instructional innovations. Finally, I will summarize the chapter by describing major themes and gaps in the literature that led to the qualitative research approach outlined in Chapter 3.

Literature Search Strategy

This chapter is an organized review of the current literature, including books, peer-reviewed journals, and websites in digital formats. For this research, I relied on digital databases, including the Walden Library, Education Source, and Google Scholar. Anticipating that this topic was cross-disciplinary (i.e., beyond educational topics), I used SOCIndex and Academic Search Complete. I accessed these sources within the Walden Library. Online search terms and keywords included *dance education, dance instruction, Hawaii, Hawaii 20th Century History, Hawaiians, hula, hapa-haole hula, hula dance,*

hula girl, Indigenous, Indigenous peoples, instructional innovations, alternative education, creative teaching, experimental methods in education, Indigenous education, traditional knowledge, and *Indigenous innovation*. Review of downloaded articles and the references led to citation chaining of related works. There was a wealth of literature on dance education addressing instructional approaches used elsewhere in the world. Research studies appeared most often in two peer-reviewed sources: *The Journal of Dance Education* and *Research in Dance Education*. Although these publications included articles on Indigenous instructional practices, there were no articles on the topic of hula. Also, what few studies that exist on Indigenous Hawaiian instructional practices concern other academic topics outside of dance education. One barrier that I faced was the lack of current peer-reviewed research on kumu hula. To gain a better background of the historical context about hula traditions, I conducted a global search in Proquest for dissertations referencing the terms hula and kumu hula. From these results, I obtained the most-frequently cited references for hula education, history, and culture. These references included older research articles as well as published books on Hawaiian history and hula. I found that the most current literature consistently cited the work of a small group of scholars who have published seminal research as old as 1909 (Emerson, 1909/1998) and several in the last 20 years (Imada, 2011, 2012; Kaeppler, 2004, 2015; Rowe, 2008; Silva, 2000; Stillman, 1996, 1998, 1999, 2001, 2007). This list would not be complete without adding the extensive research of Native Hawaiian scholar and hula expert Pukui (1936/1980, 1942/1980, 1943/980, 1983/1993; Barrere et al., 1980) who translated hula texts and archival documents and recorded ethnographic research on hula.

Conceptual Framework

Two theories informed this study: triangulation of meaning (Meyer, 2008) and participatory creativity (Clapp, 2017). This study of the instructional practices of master hula teachers used concepts and ideas that aligned with both Indigenous and Western worldviews to construct a space in between that I refer to as the *'ae kai* (Tamaira, 2018). To conceptualize this alternative world view, I have linked concepts and approaches that are compatible with both Indigenous Hawaiian and Western epistemologies. Triangulation of meaning (Meyer, 2008) offered a lens to describe and interpret Indigenous Hawaiian ways of knowing, being, and doing. Participatory creativity (Clapp, 2017) was a conceptual map to help explore the learning and instructional practices of kumu hula that could be considered innovative. After detailing each theory, I will explain how these ideas integrate into the 'ae kai conceptual framework used for this study.

Triangulation of Meaning

Meyer (2008) is a Native Hawaiian scholar who has written extensively about the need to develop new theories based on the Native Hawaiian philosophical worldview. Interviews that Meyer conducted with Native Hawaiian elders revealed an overarching cultural perspective of knowledge as individualized, contextual, and situational. Meyer (2008) identified seven basic tenets of Hawaiian epistemology.

1. Finding knowledge that endures is a spiritual act that animates and educates;

2. We are earth, and our awareness of how to exist with it extends from this idea;

3. Our senses are culturally shaped, offering us distinct pathways to reality;

4. Knowing something is bound to how we develop a relationship with it;

5. Function is vital with regard to knowing something;

6. Intention shapes our language and creates our reality; and

7. Knowing is embodied and in union with cognition (Meyer, 2008, p. 11).

Seven Basic Tenets

Hawaiian elders believed that spirituality was an intelligence rather than a religious concept (Meyer, 2008). Such intelligence, conceptualized as aloha and cultivated through experience, results in knowledge. In this context, knowledge is not a possession; it is a consequence of experience. Having a sense of place is a central concept for Hawaiians as well as other Indigenous cultures (Meyer, 2008). The land cares for the people like a parent, and the people, as caretakers, are connected to the land. The concept of place is literal as a physical connection, but it is also figurative in the way that people relate to their inner world. The body is a repository of past sensory experiences shaped through the lens of culture. Therefore, each person has unique experiences in the world. These differences reflect many realities that offer alternate perspectives and potential insights for growth. People are in a dynamic and constant relationship with others. Others include humans, all living things, the environment, and ideas. This ongoing dialog results in knowledge.

Knowledge is valuable if it is useful. Hawaiian culture places importance on practical knowledge. Knowledge that contributes to the well-being of all is a worthwhile endeavor. Meyer (1998) noted earlier that knowledge gained for its own sake is not part of the Indigenous Hawaiian construct and not necessary. Thoughts manifest into action. There is no cause and effect, but only how people react to a situation or event. Meyer

refers to this state as meta-consciousness, i.e., being and acting in complete awareness of one's subjectivity. Hawaiian epistemology does not compartmentalize body and mind; both are one and inseparable. With that assumption, the body is a source of intelligence and a vehicle for knowledge.

Interpretive Lens

Triangulation of meaning (Meyer, 2008) recognized three dimensions of Native Hawaiian epistemology to help find meaning through experience. Meyer conceptualized triangulation of the body, mind, and spirit to deepen one's experience. The first dimension is the body, epitomizing the physical reality. This aspect, recognized in science, does not represent a complete picture of the world as it exists. The second dimension is the mind. This dimension characterizes subjective thoughts of how one experiences the world. The key concept is the ability to recognize subjectivity to exercise reflexivity. This dimension helps to mediate the input from the first dimension. The third dimension is spirit. This dimension does not reflect religion but signifies an intuitive connection to all things. The dimension of spirit is the connecting thread to the two dimensions of body and mind. By engaging all three dimensions, according to Meyer, it is possible to change established research practices. The implication is that the triangulation of meaning aligns well as part of an 'ae kai conceptual framework.

Participatory Creativity

Clapp (2017) developed a framework of participatory creativity that is a systems-based approach to learning. The research of Clapp focused on how to provide students with better access to creative learning in the classroom; however, the underlying

principles of creativity align with Indigenous Hawaiian epistemology and the collective

culture. Such links appear later in this section. Clapp remarked that creativity theories

stem primarily from Western worldviews that emphasize the ability of the individual, i.e.,

the lone creative genius who is White and male (Clapp, 2017). Also, most theories

originated in the discipline of psychology, further reinforcing a belief that creativity is an

individual cognitive process. Clapp argued that such opinions had limited the ways how

people think about being creative and perpetuated a belief that a privileged few have such

an ability. These beliefs have had a detrimental impact on how teachers teach and how

students learn. Clapp, in an analysis of the lives of creative icons, concluded that ideas

were the result of interactions with others and not conceived in a vacuum.

Participatory creativity is as "a process of invention and innovation centered

around the development of ideas that are generated by a diverse network of actors each of

whom contributes to the idea development process in unique and varied ways" (Clapp,

2017, p. 46). Clapp listed six core principles:

1. Individuals are not creative; ideas are creative;

2. Ideas function as conceptual through lines that are embodied in a succession

    of artifacts that evolve over time;

3. Creative idea development is distributed amongst a diverse and dynamic set of

    actors known as a contributing stakeholder group;

4. The development of creative ideas is purposeful work;

5. There is no one way to be creative, but rather multiple ways for a variety of

    individuals to participate in the development of creative ideas, and

6. Individuals play various roles when they participate in creativity, but

those roles are neither fixed nor unidimensional (Clapp, 2017, p. 46).

The framework for participatory creativity (Clapp, 2017) is based on the work of

John-Steiner and Mahn (1996), whose research advanced the cultural-historical theory of

Vygotsky, as well as the sociocultural theory of creativity developed by

Csikszentmihalyi. These theories involve learning and the influence of culture. The

combination of these theories results in a cyclical learning process that is dialectical,

acknowledging the individual's creative contributions and its educative influence on

others. Depending on the goal, such ideation and the associated learning occur at

individual, group, and idea levels. At a local or immediate context, individuals interact

with others to form a contributing stakeholder group (Clapp, 2017). Through this

collaboration, individuals use their knowledge and experience to bring an idea into form.

As individuals learn from each other, individual and group learning occurs that further

develops an idea. This double-loop process is iterative and grows in complexity as

members continue interactive learning. However, innovative ideas evolve beyond the

confines of the stakeholder group. In this case, the learning contributions of the

individual, group, and idea levels influence others at a cultural level (i.e., a triple-loop

process of learning and development). Appendix A details these double-loop and triple-

loop processes.

'Ae kai Conceptual Framework

In the 'ae kai conceptual framework, knowledge manifests in a dynamic space

between Western and Indigenous Hawaiian worldviews. The metaphor of the 'ae kai

(Tamaira, 2018), the space where land and sea meet, represents a continuous state of change that leads to transformation (Denning, 2002). In this space, neither worldview predominates but interacts to create a new space where innovation happens. Therefore, the triangulation of meaning (Meyer, 2008) and participatory creativity (Clapp, 2017) together provide a means to understand the instructional approaches and practices of kumu hula situated in the ʻae kai.

Participatory creativity (Clapp, 2017) is compatible with Indigenous Hawaiian values and beliefs. First, Clapp conceptualized the participatory creativity framework as a guide for teachers to increase access and opportunities for all students. This central concept of inclusiveness resonates with Native Hawaiian values expressed in the triangulation of meaning (Meyer, 2008). Such inclusiveness implies that individuals share in the creative process; however, depending on the circumstances, the extent of involvement and the nature of roles vary (Clapp, 2017). Furthermore, there is no established creative process. Likewise, a well-known Hawaiian proverb, *ʻAʻohe pau ka ʻike i ka hālau hoʻokāhi*, affirms that knowledge comes from many sources (Pukui, 1983/1993). Second, participatory creativity emphasizes social learning to gain knowledge but recognizes the contributions of the individual. Likewise, the Hawaiian cultural value of *kuleana* means that individuals have a responsibility (Pukui & Elbert, 1986) to share talents and skills that help the community (Salis Reyes, 2019). Third, participatory creativity recognizes the interconnectivity of people and ideas. This aspect parallels the Hawaiian belief of all things being in relationship to one another through the intelligence of *aloha*. Clapp (2017) remarked that ideas, rather than people, are creative.

This notion is consistent with the Hawaiian epistemological position that knowledge is not a possession (Meyer, 2008) but a result of evolving relationships over time. Fourth, participatory creativity involves effort (Clapp, 2017). This idea resembles the concept in the triangulation of meaning (Meyer, 2008) that intention shapes reality and the achievement of a goal.

Some differences exist in viewing participatory creativity through an Indigenous Hawaiian interpretive lens. These views do not necessarily conflict with the participatory creativity framework but rather extend the core concepts in a manner that explain behavior in the 'ae kai. These differences offer insights into how kumu hula transmitted the traditional knowledge of hula in a changing society where Western values have predominated.

One difference is the context of the model developed by Clapp (2017) and its intended application for teachers in the classroom. This study focuses on teaching and learning outside of an academic setting; however, the teachers instruct in a traditional hula school. Another nuance relates to the learners. Clapp focused case studies on adolescent students and their shared experiences. In comparison, this qualitative inquiry will explore teachers as learners who have developed instructional practices.

However, these variances are superficial. The most notable difference relates to the cultural interpretation of the creative idea. As noted earlier, Clapp (2017) described creativity as a socially distributed process "amongst a diverse and dynamic set of actors" (p. 39). The implication is that actors are other individuals. It is at this point where Hawaiian epistemology and the triangulation of meaning (Meyer, 2008) extends the

interpretation: *Actors* include any combination of living people, ancestors, living things, and the environment. Learners share in the act of creativity in relationship to their environment in a manner that includes people, other entities, and nature. The interaction may include discourse with others but also take the form of intuition found in observation, reflexivity, and dreams. This interpretation of context transcends the physical dimension of the classroom to include the knowledge gained through the body, mind, and spirit.

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Literature Review

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Dance and Learning in a Global Context

The literature review of instructional approaches, practices, and innovations in dance revealed four themes: global learning, cultural knowledge, instructional approaches and practices, and innovative approaches and practices. Although a wide variety of studies in dance learning, instruction, and innovation exist, there were gaps found in studies about Native Hawaiian dance. An examination of the existing literature revealed the current research attention, beginning at with a global perspective. This background not only illustrated a broad perspective of current teaching and learning approaches but helped to situate hula instruction in this study, thus revealing a significant research gap. For this study, I consider learning as an outcome of experience that results in the acquisition of knowledge. Review of the literature of dance learning in a global context is vital because Indigenous communities, including Native Hawaiians, seek innovative ways to educate students in global knowledge as well as sustain their cultural identity (Ericson, 2017).

There are conflicting opinions in the literature about the educative value of dance. There is disagreement, whether dance education and learning provide students with transferable knowledge to academic and socio-emotional skills. Longley and Kensington-Miller (2020) conducted a mixed-methods study of dance educators, employers, and undergraduate students. They found that dance students developed traits including adaptability, empathy, resilience, and cultural awareness. However, such attributes were not recognized by universities as skills that transferred to a wide variety of careers. Davenport (2017) identified common perceptions that dance education promoted fitness, confidence, and communication skills but remarked that such beliefs provided little support of dance as a legitimate academic discipline in higher education. These findings within the dance education research field reflect the uncertainty of dance as a learning tool.

Furthermore, societal changes have influenced attitudes toward learning dance. Rowe et al. (2018) noted that socio-political shifts in the United States and the United Kingdom had a profound impact on dance education worldwide. The reseachers concluded that the current societal perceptions reflected a lack of interest in dance education as a means to promote global understanding. Similarly, other scholars attributed the cultural and gender biases prevalent in dance education to the dominance of Western cultural influences from Europe and the United States (Banks, 2016; Calamoneri et al., 2020; Walker, 2020). For example, Western cultures view ballet as culturally and artistically superior over other forms of dance (Chang & Hogans, 2021; Kerr-Berry, 2016; Mabingo, 2018a; Mabingo et al., 2020; Prichard, 2019; Schupp, 2020b; Thomas,

2019; Walker, 2020; Young, 2018). However, ballet has not escaped scrutiny. Critics believe that traditional ballet pedagogy has perpetuated severely strict norms of teaching compliant students to mimic movements and strive for perfection (Karin & Nordin-Bates, 2020; Prichard, 2017; Zeller, 2017). This standard that few students can reach has led to negative self-image (Prichard, 2017), health problems including injuries (Berg, 2017; Ritchie & Brooker, 2018), and the marginalization of dancers of color (Barr & Oliver, 2016; Oliver, 2020; Prichard, 2019) as well as gender (Berg, 2020; Chow, 2018; Clegg, et al., 2018; Risner, 2017b). These limiting attitudes, norms, and beliefs have impaired dance learning for those students engaged in Western forms of dance and further reinforce biases against non-Western dance forms.

Dance Learning and Culture

The literature illustrates the challenges of Indigenous communities who advocate cultural dances to gain global knowledge and to preserve a culture. Banks (2016) noted that the marginalization of Indigenous dances in New Zealand and elsewhere contributed to a lack of cultural awareness. Mabingo (2018a) criticized how Western cultural dominance has resulted in less cultural diversity, creating a negative impact on dance education. Even though jazz dance originated in the United States (and therefore is Indigenous), this American genre has received little attention in higher education due to racial and cultural bias (Thomas, 2019). Furthermore, Hagan (2020) observed that White dance students in her classes knew little of their heritage. In several studies, Mabingo (2017, 2018b) commented that there was little recognition of African dances as a cultural tradition and epistemology in academia. Schupp (2020a) found that the U.S. dance

competition culture reflected socio-cultural beliefs. In another study of competitive dance culture, Schupp (2020b) viewed that ballet technique was misapplied as a standard for judging other forms, including ethnic dances. She noted that the competitive dance culture has perpetuated norms of White privilege. Also, the absence of government support reflected a disinterest in dance education. Liu (2020) found that students in Russian universities had little familiarity of Chinese dances. This lack of attention at societal levels of cultural dances as beneficial to learning has limited opportunities to gain skills in global awareness.

However, there is a consensus that dance students, particularly those in higher education, must have an awareness of other cultures as preparation to function well in the 21st century. (Hagan, 2020; Johnson, 2018; Pedro et al., 2018; Rowe et al., 2018). As a result, there has been a call for more culturally relevant instructional practices that acknowledge diverse worldviews rather than favoring the singular, Western-dominated thinking. Mabingo (2018a), as well as Klein (2018), proposed a need for more civic engagement to promote social change. Pedro et al. (2018) as well as Liu (2020) commented that institutions of higher education needed to create learning opportunities for students to increase global awareness. Also, Liu (2020) proposed that such learning reinforced identity, promoted tolerance, perpetuated culture, and transmitted spiritual as well as moral values to the next generation. Barry (2017) developed a service-learning curriculum for college dance students that included community involvement. The author concluded that the reflective learning approach promotes deeper experiential learning and broader awareness of diverse communities. Warburton (2017) found that a cultural

exchange program for dancers promoted global understanding. Knowledge gained from learning cultural dances has the potential to meet this need to broaden cultural and global awareness.

Hula and Knowledge

As other Indigenous communities, Native Hawaiians desire to prepare their children for the future as global citizens while sustaining the culture. Studies reflect this intention through focus on the incorporation of cultural knowledge into the school curriculum (Kana'iaupuni et al., 2017; Keehne et al., 2018) as well as in the individual classroom (Kaomea et al., 2019; Ka'opua et al., 2016; Karjala et al., 2017). However, aside from the life history studies of two notable master hula teachers who sought to preserve Hawaiian culture (Kaeppler, 2015) and a few studies describing the dance productions of several hula contemporaries (Kaeppler, 2004; Shaka, 2015; Shay, 2016), there is a scarcity of recent studies of hula and learning.

Although some recent studies exist, there is limited information on hula and hula instruction in research academia. Studies in the last 50 years have relied on existing works from the first half of the 20th century as valid histories of hula that were text-based representations of Native Hawaiian knowledge (Barrere et al., 1980; Imada, 2012; Kaeppler, 2015; Kaholokula et al., 2018; Look et al., 2014; Stillman, 1996). But more recently, Rowe (2020) presented an epistemological reflection of her learning experience as a longtime student at a traditional hula school. This resulting literature review reflects knowledge about the practice of hula from these varied historical, cultural, and instructional standpoints.

Hula is the dance tradition of the Native Hawaiian people (Kaholokula, Look, Wills, et al., 2017; Kaholokula et al., 2018) that communicates cultural ways of being, knowing, and doing. Specific hand and arm motions, along with footwork, convey the interpretation of a chant or melodic poem (Stillman, 2007). Without the chant or melodic poem as the source of knowledge, no dance interpretation could exist. Since the Hawaiian society was based on an oral tradition (Kaeppler, 2004), hula has functioned as a Hawaiian language-based repository of cultural information including history, cosmology, nature, values, and daily experiences (Beamer, 1999; Imada, 2012; Johnson & Beamer, 2013; Kaholokula, Look, Wills, et al., 2017; Look et al., 2014; Rowe, 2008). Hula symbolizes the Hawaiian culture through performance and serves as a collective memory of cultural identity (Stillman, 2001).

Transmission of the knowledge of hula occurs in several ways, typically from elder to child, through informal training, or through a *hālau hula,* or hula school (Imada, 2011; Kaholokula et al., 2018). Through this process, cultural memory passes from one generation to the next as a hula lineage (Kaeppler, 2004). Training to gain dance competency is intensive; students must often commit to years of study (Imada, 2011; Kaeppler, 2015; Na'ope, 1999). To gain recognition as a *kumu hula*, or hula master, a student must prove expertise in the interpretation of poetry into choreography, knowledge of appropriate clothing and adornment, skilled use of music, and extensive knowledge of the cultural protocols associated with the performance (Stillman, 2007). The kumu hula then transmits the meaning and context of the dance through instruction to the dancers who will perform the choreography. Through performance, the dancers communicate the

knowledge to the audience and sustain collective memory (Stillman, 2001). The kumu

hula determines what knowledge will be transmitted to students (Rowe, 2020). However,

the transmission of knowledge from the past to the present through hula instructional

approaches and practices has lacked examination. This situation results in a gap in the

literature and is, therefore, a focus of this study.

Dance Instructional Approaches and Practices

The literature review showed that studies of dance instructional approaches and

practices fell into three primary categories: teacher-centered, student-centered, and

somatics. Dragon (2015), in an analysis of higher educational dance history and practices

in the United States, identified three cultural pedagogies, or paradigms, that reflect these

three instructional categories. The teacher-centered category included research that

addressed the teacher as the single source of knowledge transmission. The second

category involved student-centered approaches that placed a priority on self-directed

learning with the teachers in the role of a facilitator. The third category, somatics,

includes holistic, student-centered approaches and incorporates the anatomical and

physiological principles of somatics. I address hula instruction as part of the third

category of somatics.

Teacher-centered Instructional Dance Approaches and Practices

In teacher-centered dance instruction, the teacher is the expert; students learn

through replicating the movements of the teacher as preparation for professional dance

careers (Dragon, 2015). Studies of teacher-centered dance instruction examined the

teach-as-taught philosophy and the challenges of such instruction. Østern and Irgens

(2018) conducted an exploratory study with Norwegian dance practitioners to capture their perspectives of instruction. They observed that traditional, autocratic teaching methods had a negative impact on these individuals. Also, they found that the research participants considered dance pedagogy as outdated thinking, while choreographic processes were modern and relevant. This notion of pedagogy as a traditional instructional approach is consistent with other studies that described such instruction as teacher centered (Alaways, 2019; Dragon, 2015; Ostashewski et al., 2016).

For example, ballet instruction, as a Western form of dance, illustrates the tensions that exist between traditional, teacher-centered approaches and innovative, student-centered practices. Zeller (2017) noted that two centuries of ballet literature support the use of authoritarian practices that focus instruction on proper form and technique without consideration of the needs of students. Chow (2018) remarked that because ballet teaching is patriarchal in nature, it is less likely that women will develop into leadership roles such as choreography. These practices affirm the extent that ballet culture has supported strict authoritarian norms that run contrary to more current, participatory instructional practices.

However, this traditional mindset existed outside of ballet education as well. Dragon (2015) found that the lack of student-centered pedagogies in dance education programs in the United States higher education perpetuated the traditional teach-as-taught paradigm for students and teachers. Alaways (2019) interviewed dance instructors who taught diverse forms of contemporary dance in higher education. She found that their teacher training backgrounds varied widely since universities did not require formal

teacher training. If hired teachers lacked formal teacher training, they fell back on teach-as-taught practices. Ostashewski et al. (2016), in their action research study of Ukranian folk dance students and instructors, observed that a teach-as-taught mindset had been prevalent since the 1950s. Such limiting beliefs and practices have had a marginalizing effect on the cultural dances of others as well as student-centered instructional approaches.

Student-centered Instructional Dance Approaches and Practices

In student-centered instructional approaches and practices, self-directed learning, reflective practice, and emergent curriculum teach students life skills and self-awareness (Dragon, 2015). The literature reviewed on student-centered instruction reflected efforts to develop approaches and practices that changed the role of the teacher from knowledge authority to learning guide. In various teaching contexts, dance educators have sought ways to incorporate student-centered practices. Zeller (2017) offered instructional methods to help ballet students increase self-learning as preparation for professional careers. Roe (2017) described one instructional approach where students and teachers shared the responsibility of dance learning in higher education. Chua (2017), in a study of an exemplary ballet instructor in Finland, found that instruction was effective because the teacher was an active learner and continuously sought ways to involve students in their learning. Cameron Frichtel (2017) studied elementary school student reflections of a dance outreach program where students created, practiced, and performed dances in collaboration with the teacher. The students perceived themselves as the creators and the

teachers as helpers. These examples reflect the efforts of dance teachers to create inclusive learning environments for students of all ages.

Other research has focused on the need to give voice to special populations and individuals who have faced adverse conditions through the development of student-centered instruction. Studies that focused on inclusive instructional dance approaches included a wide variety of participants, such as survivors of natural disasters (Tai, 2018), political refugees (Martin, 2019; Na et al., 2016), students with disabilities (Cheesman, 2017; Reinders et al., 2019; Suppo & Swank, 2020), young children (Faber, 2017; Lum, 2018; Muir & Monroe-Chandler, 2017), adolescents in puberty (Mitchell et al., 2017), and disadvantaged youth (Leaf & Ngo, 2017, 2020; MacPherson, 2018; Warburton, 2017). Also, researchers have contributed to and called for more studies of dance education and student-centered instruction related to sexual orientation issues (Risner, 2017a, 2017b) and gender bias (Chow, 2018; Clegg et al., 2018). This diversity of populations studied reflect the interest in developing instruction to meet individual learning needs.

In recognition that preservice teachers benefit from student-centered instructional training, studies described professional development programs and teacher preparation courses to support student-centered instructional development. Cheesman (2016) recognized how the emphasis of math and science had displaced the emphasis on learning through the arts. The researcher noted the importance of developing creativity in preservice primary teachers and described practices to encourage undergraduate students to include dance in their instruction. Perlshtein (2017) explored the benefits of an

induction workshop for novice dance teachers and detailed reflective strategies to support

their professional development. Several studies recognized the need for the collaboration

of dance practitioners and educators to collaborate on instruction (Duffy & Beaty, 2019;

Rafferty & Stanton, 2017; Suppo & Swank, 2020). Noting a lack of connection outside of

academia for artist-teachers, researchers have investigated ways to help dance graduates

take a broader view of their career development (Fitzgerald, 2017; Roe, 2017; Wilson,

2016). Such instructional strategies that focus on the needs of the student also promote a

culture of student-centered learning for teachers.

Somatics-centered Instructional Dance Approaches and Practices

The third category of dance instructional approaches and practices is somatics.

Somatics is both a field of knowledge and a method of body awareness (Saumaa, 2017).

According to Dragon (2015), somatic education is "a discipline consisting of

combinations of dance techniques, practices, and principles from the sciences, education,

and somatics with the goal of body conditioning, injury prevention, and healing" (p. 30).

Somatics curriculum involves student-centered instructional practices that assume

learning is a holistic process that occurs at physical, mental, and emotional levels.

Saumaa (2017) noted that the application of somatics varies in emphasis and methods;

however, all forms focus on embodied learning through self-observation. However, these

variations have resulted in instructional practices and approaches that Dragon (2015)

characterized as eclectic. Somatic principles have been adapted to teacher-centered

contexts (Dragon, 2015; Rafferty & Stanton, 2017). A review of the literature reflects this

variation over the application of principles and techniques.

Although there were a few studies that focused on somatics and student-centered instructional contexts (Leaf & Ngo, 2017; Schupp, 2017; Sööt & Anttila, 2018; Tsouvala & Magos, 2016; Weber et al., 2017) there was a trend towards advocating for somatics as a way to transition from teacher-centered to student-centered approaches (Barr & Oliver, 2016; Berg, 2017; Fortin, 2018; Ritchie & Brooker, 2018; Spagnuolo & Colket, 2016; Zeller, 2017). In these studies, revisions to ballet instruction were of critical concern. Barr and Oliver (2016) argued for the adoption of more collaborative, inclusive, and reflective practices in established Western-based forms of dance to promote improved health and well-being of students at all ages and levels. Similarly, Fortin (2018) proposed dance as a health intervention developed in collaboration with health professionals, dance practitioners, somatic instructors, and the community. The researcher suggested that studies using mixed methods approaches may persuade health and arts professionals to collaborate and contribute new applications that promote increased wellness. Other studies (Berg, 2017; Ritchie & Brooker, 2020; Schupp, 2017; Spagnuolo & Colket, 2016; Zeller, 2017) detailed strategies for ballet teachers who wanted to incorporate somatic methods into their teacher-centered approaches. These studies reflected the intent of researchers to substantiate dance as a viable tool for learning by focusing on the more quantitative, scientific attributes of learning and instruction.

Somatics and Culture. Fortin (2018) observed that, prior to modern times, people believed that art had restorative powers that benefitted the community. This holistic belief is implied in the somatics approach. The somatics or body awareness model proposed by Dragon (2015) acknowledged that cultural and historical aspects of

dance might be incorporated into instructional approaches that are within the student-centered and somatics instructional categories. The literature review revealed a growing number of studies on the topic. In one study, Mabingo (2018b) remarked that although current instructional approaches in dance education incorporate techniques to help students experience movement awareness, the cultural context of the movement is absent. He noted that in the Western worldview, dance and music are compartmentalized; in contrast, African dances and music are taught in a unified manner. Banks (2016) noted a similar need to infuse Maori cultural aspects into university dance instruction in New Zealand that included somatics. In another study, Young (2018), a Chinese American, taught Afro-Haitian dances to university students using in an approach drawing from Chinese, Asian Indian and Japanese somatic traditions. Foley (2020) questioned the cultural relevance and propriety of using unique regional Irish step dances in competitive performance. She proposed the use of somatic methods and knowledge of the historical context to better inform teachers, students, and competition judges.

Most notably, Walker (2019) conducted a nationwide study of higher education dance students and teachers to develop an approach to overcome Western cultural biases in university dance education. The author sought to use somatics to redefine dance education and increase the cultural awareness of students. These studies suggested that although somatics body awareness as a potential tool for the instruction of cultural dances, the cultural aspects should be more prominent and recognize the holistic quality of the dance tradition, revealing a gap in the current research.

Hula Instructional Approaches and Practices. Noting this gap in the literature regarding the cultural aspects of dance instructional approaches and practices, I discuss hula as a cultural interpretation of a somatics-based body awareness approach as detailed by Dragon (2015). I present hula instruction in this manner for several reasons. First, the somatics approach has the flexibility to incorporate cultural and historical aspects of instructional approaches. Second, the somatics approach is holistic because learning is an integrative process of the body, mind, and spirit (Dragon, 2015). This belief is compatible with the Native Hawaiian beliefs of how knowledge is acquired (Meyer, 2008). Third, the somatic approach is student-centered in philosophy, but in practice, somatic methods have been adopted in teacher-centered instructional approaches. This ambiguity between theory and practice provides a broad lens to view and interpret hula instructional approaches shown in the literature.

Although some recent studies exist, there is limited information on hula and hula instruction in research academia. Studies in the last 50 years have relied on existing works from the first half of the 20th century as valid histories of hula that were text-based representations of Native Hawaiian knowledge (Barrere et al., 1980; Imada, 2012; Kaeppler, 2015; Kaholokula et al., 2018; Look et al., 2014; Stillman, 1996). This resulting literature review reflects knowledge about the practice of hula from the historical, cultural, and instructional standpoints.

Cultural and Historical Aspects of Hula Instruction. Hula schools, known as hālau hula, have endured for centuries. The records of the first Western explorers indicated that schools existed before 1779 (Barrere, 1980). However, it was not until the

early 1900's that the hula tradition was documented (Emerson, 1909/1998). The detailed

account of Emerson reflected firsthand observations as well as information from Native

Hawaiian informants over an extended time. However, the writings of Emerson occurred

during the latter part of the monarchy period (Barrere, 1980). Often cited by other

scholars, Emerson provided comprehensive descriptions of the hālau organization,

training, and rituals. Emerson, despite an affinity for the Native Hawaiians and their

culture, gave observations that reflected the perspective of a cultural outsider trained in

Western science. Several decades later, Native Hawaiian scholar and hula master Mary

Kawena Pukui (1942/1980) offered an alternative narrative. The ethnographic studies of

Pukui offered a unique Native Hawaiian perspective on the hula training of individual

students, including herself. Pukui (1942/1980) gave accounts of her training lineage that

included the spiritual aspects of hula. Barrere et al. (1980) remarked that the research

contributions of Pukui were so extensive that she overshadowed Emerson as the leading

authority on hula in the 20th century. The often-cited studies of Pukui remain relevant,

even in the present (Kaeppler, 2015).

　　　　These early studies described the importance of the hula teacher in the Native

Hawaiian community. Pukui (1942/1980) described the prevalence of hula at a time when

each island in Hawaii had a ruling chief. In those days, hula was a cultural practice for

people at all levels and ages of the Hawaiian society. Emerson (1909/1998) remarked that

in such times, an individual who completed training and the graduation ritual had earned

the right to attain kumu hula status and organize a hālau. The kumu underwent rigorous

training, not only to become an accomplished dancer but to memorize and compose

poetic texts (Barrere, 1980). This ability to create a repertoire of dances honored the hula lineage, or ancestral genealogy of the kumu hula (Stillman, 2007). The graduation ceremony functioned to convey public recognition of this accomplishment (Pukui, 1942/1980; Rowe, 2020). The kumu hula, in the establishment of a hula school, had multiple responsibilities as an instructor, spiritual leader, and organizational manager (Emerson, 1909/1998). This history shows that the kumu hula was considered the expert authority on teaching dance, suggesting that instructional approaches at that time were teacher centered.

However, the kumu hula did not carry out this responsibility alone. There were support personnel in the hālau to assist the dancers in learning the choreography. Also, the hālau structure included helpers who provided accompaniment, monitored behavior, assisted students, tended the kuahu altar, and secured the learning space (Emerson, 1909/1998). One important role was that of the student leader or po'opua'a (meaning pig's head) who was primarily responsible for the performance. Also, there were other student supporters, or paepae (Pukui, 1943/1980). Another key participant was the ho'opa'a, or chanter/musician (Pukui, 1936/1980). This student memorized numerous poetic texts, as well as intonation, to accompany the dancers. Without the ho'opa'a accompaniment, the dancers could not perform. A skillful ho'opa'a could later become a kumu hula. This emphasis on performance resembles the goal of teacher-centered instruction (Dragon, 2015). However, the teaching function was managed collectively by the teacher, students, and other helpers, suggesting the existence of some student-centered practices.

Although much of the literature on hula instruction has been limited to historical records, Rowe (2020), wrote of her experience as a longtime hula student in a traditional hālau. She detailed the knowledge system of hula transmitted to her, reflecting cultural values and norms of behavior in the hālau. Based on her experience, she described five categories of knowledge learned from hula. First, knowledge is gained by observation and memorization, using nature as a guide to imitate movements. According to Rowe (2020), students must be silent, observe, and learn. This practice conveyed respect to the kumu and reflected the student's ability to remember chants and dances. The next category of knowledge was through performance demonstration. When gaining knowledge, students have a duty to share their learning; performance then serves as a testing method. Performance reflects the group effort and shows how well the kumu has transmitted the knowledge. The third category is to know and honor that other perspectives and schools of thought exist. There is no single way of doing things and students should engage in continuous learning. The fourth category is knowing that with knowledge comes the responsibility discerning when and with whom to share. Kumu are careful about what dances they teach and who will learn. In the final category, knowledge comes from dreams, signs, and intuition. Rowe (2020) commented that students must not only learn the movements and meaning of the dance; they must form an emotional connection.

Holistic Instructional Approaches. Instructional approaches and practices described in the literature reflect methods that integrated the body, mind, and spiritual aspects of hula. Emerson (1909/1998) observed that instruction by the kumu focused on

the accuracy of the chants and dance movements. His descriptions gave evidence that the instructional approach of the kumu hula was inductive, building layers of information. Emerson described one instructional method used to teach a new dance. After introducing a chant or song to the students, the kumu tasked a class member to recite while the kumu demonstrated the dance motions. Students had to focus their attention to memorize poetry and movement. Students would then repeat the dance until the kumu assessed their performance as satisfactory. Although this description illustrates the importance of the role of the kumu hula as the dance expert, the replication of movement characterizes a teacher-centered approach. However, Emerson (1909/1998) observed the teaching approach of the kumu as inductive. Based on the categories put forth by Dragon (2015), this curriculum is emergent, an attribute typical of student-centered and somatics body awareness practices.

In contrast, Pukui (1943/1980) focused on the ritual of instruction, beginning with a chant to invoke the hula deity and to grant knowledge. The kumu hula chanted to connect the learning to the gods, the chiefs, and the land. While the kumu continued, students adorned themselves with clothing and garlands in a ritual fashion. The next chant honored the chiefs, name by name, followed by other chants. Pukui (1943/1980) explained that new choreography came from dreams of the po'opua'a. It was the po'opua'a who demonstrated the new dances to the students. This explanation reflected the belief that the dances were divine in origin, resulting from dreams and inspiration.

The description that Pukui provided offers several insights. The first insight is the importance of conveying to students the cultural and historical knowledge embedded in a

hula. This practice is possible in student-centered and somatics instructional approaches (Dragon, 2015). Also, Pukui described the spiritual aspect of instruction and how dreams inspired dance creation. What was insightful was that a student could contribute such inspired ideas in the creation of a dance. Together these aspects implied the use of student-centered and somatic approaches as described by Dragon (2015).

Instructional Shifts. With the increased foreign influence as well as the growth of Christianity in Hawaii, societal pressures created changes that suppressed hula practices into secrecy and altered cultural roles (Kaeppler, 2015). After the decline of the Hawaiian monarchy, women took more active responsibility as the keepers of culture and emerged as hula practitioners. Pukui (1936/1980) commented that this change occurred because the men no longer danced. This new generation of hula teachers gained mastery by training privately with well-known dancers from the royal Hawaiian court (Imada, 2012; Kaeppler, 2015).

As the de facto experts of hula, this new generation of kumu hula broke with the structured hālau training tradition to preserve the older forms of hula. This training continued the learning of the sacred rituals for Laka, the goddess of hula, as well as teaching the observance of specific protocols associated with the dances (Kaeppler, 2015; Stillman, 2001). They discretely taught a select few individuals, including their daughters and others who showed talent (Imada, 2012; Kaeppler, 2015). This shift in roles led to individualized instruction, carefully handed down from teacher to student in a family home environment. The result was the creation of a hula lineage tied to these women that extends to the present day. This period of transition was significant because the survival

of the Hawaiian culture and hula was paramount. Instructional practices and roles, then, may have held less importance and therefore afforded more flexibility.

Mary Kawena Pukui, a Native Hawaiian hula practitioner, is widely known as an ethnographer of Hawaiians and culture (Kaeppler, 2015; Stillman, 2007). The work of Pukui provides a significant example of hula instruction in the early 1900s that preserved the ancient hula using non-traditional approaches. Hula training for Pukui began at age 4 (Hopkins & Erikson, 1982/2011) with her grandmother, mother, and aunts (Kaeppler, 2015). At this young age, Pukui did not play with other children and instead learned the hula every day (Hopkins & Erikson, 1982/2011). However, another notable hula teacher, Keahi Luahine (referred to hereafter as Keahi), dreamed that she should teach Pukui to sustain the knowledge for a future student. Pukui (1936/1980) noted that the instructional method Keahi used was like the one described by Emerson (1909/1998), including rituals to the hula goddess Laka. Keahi would recite the poetry that would be memorized by a student. Once learned, the student would learn the accompaniment, and Keahi would instruct the students on each dance movement in meticulous detail. Dances were learned one at a time (Pukui, 1936/1980). Based on this description, it is evident that the teacher was still a crucial source of knowledge, but the instruction was tailored to the student with a focus on transmitting the hula tradition.

After completing training, Keahi sent Pukui and to study with a male teacher named Kapua (Kaeppler, 2015). The instructional approach of Kapua did not resemble the methods of Keahi (Pukui, 1936/1980). Rather than scaffolding the learning as Keahi, by introducing the poetry, gradually adding layers of accompaniment, Kapua played and

chanted for two hours each class night. Students had to memorize through focus and repetition. Pukui (1936/1980) commented that this approach made learning difficult but as a result, students gained skill by hearing subtle nuances of tone and rhythm. Pukui broke with tradition when she became the first female ho'opa'a of this school. Pukui later studied with several other kumu hula to learn dances traditionally. Pukui never organized hula hālau but taught a small but select group of students. Kaeppler (2015) noted that Pukui and her teachers believed that dances should be replicated as accurately as possible without modification. These instructional approaches emphasized imitating the movements of the teacher, as in a teacher-centered approach (Dragon, 2015). However, the focus was to transmit and preserve the hula tradition that represented the Hawaiian culture. The instructional approach was beyond a teacher-centered practice, moving more towards individualized, student-centered, and somatics instruction.

The literature, although limited, supplied evidence that instructors revised their instructional practices as needed to preserve hula. Kaeppler (2015) described the training of another kumu hula, Kau'i Zuttermeister, who studied with a kumu hula of the Mormon faith. This kumu explained the significance of the kuahu ritual but did not feel such rituals were necessary to learn the hula. This change represented a gradual shift away from the sacred practices in the hālau towards a more secular practice (Kaeppler, 2015). Zuttermeister eventually became a kumu hula in the mid-1930s and formed a hālau. Zuttermeister instructed students in older forms of hula as well as more Westernized, contemporary styles. As with Pukui, Zuttermeister believed that dances were to be performed as taught and not changed. Two daughters succeeded Zuttermeister in teaching

lineage and maintained this standard (Kaeppler, 2015). These practices by Zuttermeister and successors suggested that preserving the hula movements and meanings took precedence over teaching the spiritual aspects of the tradition. In this respect, there was a greater emphasis to teach as taught that is characteristic of teacher-centered approaches (Dragon, 2015).

Although there were many other hula experts during this period, little research information exists about their hula instruction. However, one prolific Native Hawaiian cultural practitioner, Winona Beamer, contributed extensively as a hula educator well into the 21st century. Beamer was known for her expertise as a teacher, dancer, musician, and writer on Hawaiian culture (Johnson & Beamer, 2013). Also, Beamer founded a community-based archive dedicated to hula. The grandmother of Beamer, Helen Desha, who descended from 13 generations of hula masters (Hopkins & Erikson, 1982/2011), taught Beamer hula from an early age. This training included kuahu rituals as well as instruction in traditional, pre-Christian dances, and chants (Beamer, 2001). Beamer regarded this grandmother's tradition of hula instructional practices as innovative, using teaching aids in nature such as the ocean waves to learn to chant. Despite the ban of the using Hawaiian language, Beamer (2001) taught Hawaiian culture for 37 years in a formal education environment then retired to author publications on topics such as hula. Beamer's instruction took place in the schoolroom but left a teaching legacy that lives on through writings, compositions, and archival endeavors. Beamer used a wide variety of instructional approaches to perpetuate Hawaiian culture and the hula tradition that could be considered holistic, suggesting the use of a somatic body awareness approach.

Contemporary Hula Instructional Approaches: Diverse and Ambiguous.

Despite these collective efforts to preserve hula, Hawaiian culture continued to decline. Hopkins and Erikson (1982/2011) noted that by the mid-1950s, Christian beliefs overshadowed Hawaiian spiritual beliefs that had been integral to hula. The younger generation had lost interest in Hawaiian culture, and hula schools decreased in number. This decline extended into the late 1960s (Kaeppler, 1993/1996). In response to this problem, concerned Hawaiians and non-Hawaiians created learning opportunities and events that would encourage the preservation and revival of the hula traditions. This movement gathered momentum and hula became an integral part of the Hawaiian cultural renaissance that extends to the present. One of the earliest initiatives in 1969 was the establishment of public and non-profit cultural organizations (Hopkins & Erikson, 1982/2011; Kaeppler, 1993/1996) that offered classes in hula. However, there were a diminishing number of knowledgeable but elderly hula experts. In 1972, kumu hula Maiki Aiu, a former student of Pukui, established the first teacher training program. Although the program generated much controversy in the community, many of the graduates are now prominent kumu (Hopkins & Erikson, 1982/2011). These community-based initiatives, although not focused on instruction, were innovative means of ensuring the survival of the hula tradition.

Another phenomenon that led to increased interest in hula was the establishment of competitive events. Such events highlighted the competence of students through performance and reflected the teaching expertise of the kumu hula. One such example was the Merrie Monarch Festival, established in 1963 and held annually in Hilo, Hawaii.

The festival and its hula focus became a symbol of Native Hawaiian identity (Kaeppler, 2004; Shay, 2016; Stillman, 1996, 2007) and attracted a global audience (Yaguchi, 2015). Interest in competitions has led to a proliferation of hālau hula, in Hawaii and beyond (Stillman, 1996, 1999, 2007; Yaguchi, 2015). These recent events have inspired kumu hula to create new interpretations of older forms of hula (Kaeppler, 1993/1996, 2004; Rowe, 2008). However, the instructional approaches and practices that kumu hula currently use to teach students in preparation for these events remained unstudied.

In addition, kumu hula have developed instruction to apply to Western disciplines, such as medicine and health care (Kaholokula, Look, Mabellos, et al., 2017, 2021; Kaholokula, Look, Wills, et al., 2017; Kaholokula et al., 2018; Loo et al., 2019; Walters et al., 2020) as well as foreign schools (Stillman, 1999; Yaguchi, 2015). In the case of medical and health care, kumu hula have developed instructional approaches as interventions to measure the health and well-being benefits of hula. Although these studies imply the holistic nature of a somatics approach, the purposes of these studies were to increase awareness of hula as a credible health practice. These research efforts followed a similar trend with other studies where a somatics was applied to Western-based forms of dance (Barr & Oliver, 2016; Fortin, 2018). However, the research studies of hula supply few details of how kumu hula developed instructional strategies, thus revealing a significant gap in the literature.

Dance and Instructional Innovations

Instructional innovations and practices in dance, as defined earlier, are processes that result in something new and useful. In the last section, I identified three categories of

dance instructional approaches and practices: teacher-centered, student-centered, and somatics. These approaches differed in assumptions, learning goals, and purposes. Dragon (2015) considered student-centered and somatics approaches as innovative departures from teacher-centered approaches. This notion would suggest that the teacher-centered instructional methods either lacked innovation or that innovations were artistic creations of the teacher. However, studies showed how teachers attempted to overcome the teach-as-taught mindset in highly structured traditions such as ballet with the use of various techniques. Therefore, what is defined as innovative -- or new and useful -- may depend on the type of instructional approach and practice. The review of the literature revealed studies that described best practices and approaches used as a transition from teacher-centered approaches to more student-centered, holistic methods.

Innovations and Learning

A variety of studies exist linking dance education with positive learning skills and benefits for students of all ages and levels. These studies addressed the use of instructional innovations that considered new and useful in curricula by combining dance with other knowledge domains. In K-12 education, studies focused on instructional approaches to help students learn subject matter and gain problem-solving skills. LaMotte (2018) developed a curriculum for fifth graders that combined dance with the subject of transportation. The researcher found that the experimental group that used the integrated curriculum tested higher than the control group and showed higher levels of engagement. Sharma et al. (2021), in a mixed methods study, followed a program in New Zealand primary schools that incorporated dance with learning math and reading. The researchers

found no overall impact on the children's math and reading scores except for Asian and Maori/Pasifika students, whose reading scores improved. Adams (2016), as an elementary dance schoolteacher and researcher, combined dance with English language arts that allowed kindergarten students to learn at their own pace. This change in curricular approach helped students to increase their confidence, problem-solving skills, and creativity.

Leandro et al. (2018) investigated the impact of using a creative dance curriculum to learn math concepts in a primary school. A comparison of pre-test, post-test, and retest results showed that the students with the dance curriculum intervention learned more math concepts than the children in the control group who lacked the dance component. Hally and Sinha (2018) developed instruction combining math and dance to increase middle school girls' interest in STEM. The curriculum covered Common Core math standards and used young women as STEM mentors. The instructors measured student attitudes and assessed learning, showing significant improvement from pre- to post-tests. Valls et al. (2019) interviewed science teachers who integrated creative dance into their curriculum for a 5-year period. The teachers saw that their students had an increased comprehension of science and strengthened reasoning skills. Combining dance with other academic subjects was innovative because such integration was considered a new approach to teaching and was useful because the students benefitted.

In higher education, instructors developed innovative instructional approaches to improve dance performance as well as health and well-being. Andersen (2018), in a mixed-method study of a somatics (body awareness) training, found that students gained

overall skill improvement, transferring their learning of body awareness techniques to dance execution. Lim et al. (2018) found that when dancers and physical therapists learned collaboratively, greater mutual awareness of the dancer's physical state resulted in avoiding injury. Barlow (2018), in a comparative literature review of body awareness, concluded that dance education should include body awareness instructional approaches. DiPasquale et al. (2021) found that university dance students overtrained during the school year and suffered from fatigue and increased injury. To remedy this problem and promote well-being, they suggested that instructors vary activities by intensity level, consider students' overall academic load, and add wellness activities.

Other studies described the use of transdisciplinary curriculum by developing dance instruction to teach community engagement (Fitzgerald, 2017), design principles with critical thinking skills (Lepczyk et al., 2018), and social justice (Wilson & Moffett, 2017). These instructional approaches were beyond a traditional, teacher-centered approach that focused on professional dance career preparation. Therefore, these approaches were innovative because the focus was on providing students with life skills beyond dance performance.

Technology. Studies focused on the innovative applications of technology in combination with dance education to create, perform, and interact. Such approaches arose out of necessity due to the geographic disbursement of dance artists, students, and choreographers, and recently, the impacts of COVID-19 restrictions. Weber et al. (2017) detailed their collaborative research project to create and rehearse a dance production with participants in different global locations. Colombi and Knosp (2017) evaluated

course management systems (CMS), such as Blackboard, Design for Learning, and Moodle, and provided instructional suggestions for online dance learning.

In comparison, Li et al. (2018) studied three Canadian high schools and found that some technologies such as podcasts and blogs were more effective than CMS. The researchers found that podcasts and blogs were easier to use, and students had access to evaluation tools needed for reflection. Two action research studies (Brooks Mata & Kasra, 2017; Toenjes et al., 2016) described the use of mobile devices as interactive props in dance performance. In both cases, students designed, choreographed, and performed in a manner that involved interaction with the audiences through their devices. Suppo and Swank (2020) studied pre-service teachers who instructed students with disabilities in dance. Each teacher was paired with a student for the 10-week session. Using iPads and iPhones, teachers used video modeling to record each student and to record a demonstrated move for practice. Using this technology, teachers and parents saw improvement in students' dance moves as well as increased engagement. The use of technology in dance instruction is innovative because students are actively engaged in the learning process, shifting control away from the teacher. This radical departure from the traditional, teacher-led dance instruction reflected the need to adapt instruction to function in a digital, geographically dispersed society.

Although these studies promoted the use of technology in dance instruction, these articles reflected conditions prior to the COVID-19 pandemic. Heyang and Martin (2020), in their auto-narrative study, offered reflections of how this crisis would affect global dance in higher education. They proposed that technology offered opportunities to

develop innovative instruction that could benefit student learning.They observed that instructors and students had adapted to dance classes in an online environment. This change had the potential to increase learning access for geographically disbursed students, connecting them to diverse dance communities. However, Heyang and Martin surmised that there were challenges, such as possession of adequate technology, consideration of cultural and social contexts, and the realization that not all individuals were suited for online learning. To mitigate these problems, the development of instructional approaches that included both face-to-face and online instruction could sustain dance education.

Reflective Teaching and Learning Practices. Students and teachers lack the reflective skills needed for the 21st century (Chang & Hogans, 2021; Rafferty & Stanton, 2017; Rowe et al., 2018; Sööt & Anttila, 2018). In response to this need, dance education programs have incorporated more reflective approaches to teaching and learning in the past two decades (Risner, 2017a). Teachers have developed reflective practices in dance to use as a tool to deepen understanding of their instructional approaches and themselves (Alaways, 2019). Dance instructors have used reflection to address instructional challenges related to racism (Barry, 2017; Kerr-Berry, 2016), culture (Chang & Hogans, 2021; Kay, 2017; Mabingo, 2018a, 2019a, 2019b, 2019c), community partnerships (Fitzgerald, 2017), personal identity (Risner, 2017b), and student mindset (Roe, 2017). Ballet teachers applied reflective instructional practices in ballet classes in the United States (Zeller, 2017), Finland (Chua, 2017), and United Kingdom (Clegg et al., 2018; Petsilas et al., 2019).

However, studies of reflective practices were not limited to teachers. The literature revealed the widespread use of contemplative practices among students, teachers, and artists. Students learned reflective practices to deepen learning (Fisher, 2017; Leaf & Ngo, 2017; Muir & Monroe-Chandler, 2017), accelerate learning (Ritchie & Brooker, 2018), improve dance performance (Andersen, 2018; Gose, 2019), increase cultural understanding (Mabingo, 2018a; Pedro et al., 2018), and gain creativity (Cameron Frichtel, 2017; Kim et al., 2019). Several studies focused on the importance of reflective practices for preservice and novice dance teachers. Perlshtein (2017), in a mixed-method study, described a development program in Israel that promoted reflective practices to assist novice teachers in adapting to their profession. Other researchers have recommended various instructional strategies that developed student reflection, such as discussions, written reflections of dance execution (Sööt & Anttila, 2018), learner-instructor practice (Cheesman, 2020; Young, 2018), and use of elucidative visual art (Ohlberg, 2020). Reflective instructional approaches are innovative since teacher-centered practices have traditionally focused on replicating the dance motions and philosophy of the instructor. Contemplative practices are useful to teachers, students, and artists because such methods promote embodied learning for the individual. Reflective practices are useful and new; therefore, such approaches could be considered innovative.

Indigenous Instructional Innovations. A review of the literature reflected Indigenous dance instruction practices and approaches that considered both Western and Indigenous worldviews. Studies described innovative instruction using technology (Chavda, 2019; Prichard, 2016) as well as reflective practices (Kay, 2017; Mabingo,

2018a, 2018b; Pedro et al., 2018). However, the themes of instruction focused on increasing understanding of diverse cultures and cultural competency. Mabingo (2019d) examined the experiences of urban youth in a breakdance project in Uganda. In this study, students developed their breakdance skills by incorporating traditional Indigenous dance movements to reflect their identity. In another study, a concern was how to teach cultural dances in a culturally sensitive manner, even if the teacher was not a member of the culture. Sato et al. (2021) studied how Japanese physical education teachers sought training so they could teach Japanese traditional dance in an authentic manner. Foley (2020), concerned about misappropriation of a traditional Irish dance used in competitions, proposed multisensory instruction including the historical context to increase student understanding. Prichard (2016) described the risks teachers face in teaching Native American dances as outsiders. The researcher recommended the involvement of Native American resources to ensure authenticity and integrity.

Kay (2017) faced a challenge to instruct adult learners about Indian Residential Schools in Canada. The researcher, reflecting on Western and Indigenous worldviews, developed an instructional approach to overcome teaching apprehension and gained insight into the Indian Residential School experience. Banks (2016) collaborated with a Maori dance master to teach students about the Maori culture. Chang and Hogans (2021) proposed eight approaches to teach world/urban dance forms to help university students understand movement, learn cultural responsibility, and critically reflect on all dance forms.

Other researchers, as cultural members, supplied instructional strategies to help students increase cultural competency through learning African dance (Mabingo, 2018a, 2019c), and Latin dances (Pedro et al., 2018). These instructional approaches are innovative because cultural knowledge, traditionally held by cultural members, is now transmitted to, and taught by cultural outsiders. This shift of inclusion was useful because it ensured the survival of cultural traditions. Also, this increased understanding and awareness of the cultures may promote social change.

Hula Instructional Innovations

The Hawaiian culture places importance on practical knowledge that contributes to the well-being of all (Meyer, 2008). In the Hawaiian worldview, creating new knowledge through innovation occurs out of necessity. Rowe (2008) observed that cultural shifts had an impact on dance. However, not much is known about how instructional approaches shaped these changes in hula. This section addresses the innovations that occurred with hula and the related instructional implications.

Although there is evidence that external social and political tensions triggered changes in the hula, there were indicators that changes came from the individuals within the culture as well. Emerson (1909/1998) observed that kumu hula did not follow a specific formula. He noted that teachers were self-directed but relied on the practices of their predecessor as a point of reference for instruction. As a result, motions varied among schools and islands.

Researchers have varied opinions on the merit of such changes made to hula. Hopkins and Erikson (1982/2011) commented that during the late 1800s, the changes to

hula were so extensive that the music was altered substantially. From another perspective, Imada (2012) observed that hula reflected and adapted to the historical and political context of the time.   Kaeppler (2004) noted the malleable nature of hula and explained that this practice of alteration originated from a time when audiences knew and understood the ancient dances performed. These changes in movements, lacking mediation, have continued as a cultural norm. Hula had become so versatile that it encouraged innovation, although fragmented, to preserve tradition. However, the debate of preserving traditional forms versus innovating to perpetuate hula continues to the present (Rowe, 2020).

Kaeppler (2004) viewed tradition as an evolutionary process. In a case study of hula, Kaeppler identified a series of stages that led to innovation and resulted in *recycling*. The first stage was the preservation of hula to sustain cultural memory. The next stage was the evolution of hula as a means of artistic expression of the past. The third was the use of hula to pay tribute to people and events. The fourth was the evolution of hula as a symbol of cultural identity. Kaeppler observed that when hula went underground and re-surfaced, dance movements had new contexts and meanings.

The concept of recycling (Kaeppler, 2004) provides a starting point to examine a pattern of changes to the hula. However, Kaeppler wrote from an anthropological perspective. I have taken liberties by applying these categories to an instructional context. In addition, I have included a stage to describe changes in the last 15 years since Kaeppler (2004). Embedded in these changes were innovative practices that had instructional implications.

Preservation of Hula as Cultural Memory. As Christianity became more prevalent in Hawaii, ritual practices associated with hula diminished. Instruction shifted from the organized hālau that performed as an essential part of the Hawaiian culture to an obscured practice where kumu hula taught in secret (Hopkins & Erikson, 1982/2011). The kuahu altar was an integral part of the instructional approach, but by the early 20th century, few practiced and instructed hula in this manner (Kaeppler, 2015). Hula shifted from a widespread system of hālau to instruction for a select few. Although this attention to secrecy suggested that kumu hula acted to protect hula, this movement was, in a practical sense, an innovation to perpetuate the hula tradition and the Hawaiian culture. Instruction evolved further due to geographic isolation, resulting in different teaching lineages (Hopkins & Erikson, 1982/2011; Kaeppler, 2015). However, knowledge became fragmented (Stillman, 2001), so students were sent to other kumu to learn different aspects of hula, and at times, observed different teaching approaches (Kaeppler, 2015). This practice implied that kumu hula taught in conditions perceived as isolated; in reality, they had access to a network of other kumu as teaching resources. The students who received training in this manner gained knowledge passed down from multiple sources while maintaining a hula lineage. This instructional approach implies that kumu hula participated in a hidden community of practice as a means to address knowledge fragmentation and to keep the cultural memory.

Another innovation was the preservation of hula in the archive. Imada (2012) observed the lack of archival records describing hula performance. Stillman (2007) noted that the importance of these records provided an opportunity to use past knowledge to

create new knowledge. Pukui (Barrere et al.,1980) was a subject matter expert who contributed to this effort in multiple ways. The act of writing down knowledge based on an oral tradition was an accomplishment (Kaeppler, 2015). As a kumu hula trained in traditional practices, Pukui taught a few students. However, by documenting personal experiences, researching the oral histories of other hula experts, and interpreting poetic texts, Pukui transmitted knowledge of the hula tradition in a broader context (Kaeppler, 2015). The ethnographic research of Pukui remains as a highly respected source used to educate a wide audience regarding the hula tradition.

Hula as an Artistic Expression of the Past. Given the sociopolitical climate in Hawaii in the 19th century, ritual forms of hula were not sanctioned. Instead, older forms of hula were revised as entertainment where the meaning was exclusively understood by a culturally knowledgeable audience (Kaeppler, 2004). For example, a sacred form of hula used a special drum. Rather than integrate the drum to a new context, kumu hula used it in plain sight as performative art (Kaeppler, 1993/1996). As a monarch, Kalakaua played a significant role in developing hula as an art form. He created a new form of hula that was a combination of Western and Hawaiian dances (Imada, 2012). Despite this role as a monarch, Kalakaua actively instructed court musicians and dancers. This blending of old and new hula forms as art had a far-reaching effect.

As the monarchy declined, the court hula dancers sought alternative opportunities. The most notable change was their performance of hula outside of Hawaii. Although they had the knowledge and training of ancient forms of hula, they considered devising new ways to present hula to foreign audiences. Imada (2012) noted that these dancers were

empowered individuals who used their expertise to develop innovative hula

performances. In this sense, these dancers and musicians functioned as performing artists

and educators, raising awareness of the Hawaiian culture on transnational venues. Until

that time, hula had never been performed before outside of Hawaii (Imada, 2011).

Because there were no guidelines for performing hula outside of a Hawaiian cultural

context, the dancers created a new repertoire, costumes, and staging. In addition, they

introduced each dance with an explanation as part of the performance. This change was

innovative since audiences in a Hawaiian cultural context did not require such a scaffold.

As traveling performers, they had to rely on their past training to create new routines.

However, they did not change the older dances they learned as hālau students. Therefore,

ancient dances remained unchanged (Imada, 2011). Dancers and musicians collaborated

on performance repertoire, suggesting that instruction was a self-directed, social learning

process. When a new member joined the circuit, it was up to the cast to train them. In

later years, hula troupes employed at various nightclubs across the U.S. designed

choreography and trained dancers in a similar way (Imada, 2012). This change was a

departure from traditional training practices used in Hawaii where the kumu hula taught

students.

   Hula as a Tribute to People and Events. However, transnational venues were

not the only sources of hula innovation. Changes to hula occurred in Hawaii. Since

ancient times, older forms of hula functioned to pay homage to the gods, chiefs, and to

memorialize important events. In a modern context, hula was repurposed to recognize

special occasions considered vital to U.S. interests. Use of hula performances in the

forms such as luau entertainment for dignitaries as well as greeting visitors became

critical during World War II to maintain national solidarity and the morale of troops who

fought in the Pacific (Imada, 2012). If teachers taught the ancient dances, kuahu rituals

were rare. However, the movements to these dances remained unchanged (Kaeppler,

2004, 2015). As an alternative, musicians and kumu hula performed contemporary hula

from the era of Kalakaua. Also, a new form evolved for English-speaking audiences

called hapa haole hula (Kaeppler, 2004, 2015). This commercialized form was prevalent

in film and media in the 20th century. In Hawaii and elsewhere, hula schools, now called

hula studios, provided instruction of these modernized types of hula to Hawaiians,

tourists, and military spouses. Although such changes could have signaled the end of

traditional forms of hula, Imada (2012) argued that these innovations helped to perpetuate

the hula tradition. Imada remarked that hula was so flexible that it provided kumu hula a

means of economic support and allowed them continued control of the cultural

knowledge. Although kumu hula created new types of hula and performed at public

venues commemorating military and tourist venues, there is little information on how

kumu hula revised their instruction. Also, kumu accepted students who were not Native

Hawaiian. The new form of hula using the English language provided a learning scaffold

for students outside of the culture.

Hula as a Cultural Identity. The collective efforts to recover older forms of hula

became prevalent during the Hawaiian renaissance that began in the late 1960s. Hula

once again re-surfaced but under new circumstances. However, the culture in Hawaii had

changed over the past three centuries, and so had hula (Kaeppler, 2004). Hula festivals

and competitions became a symbol of ethnic identity. One significant catalyst for innovation was the establishment of the Merrie Monarch Hula Festival where hula schools danced competitively in old and modern hula forms (Hopkins & Erikson, 1982/2011; Kaeppler, 1993/1996, 2004; Rowe, 2008; Shay, 2016; Stillman, 1996, 1999, 2001). As kumu hula in the 1970s sought to understand the poetry of the past, they researched the Bishop Museum archives in Honolulu (Stillman, 2007). Since choreography was not documented, there was little knowledge of the movements. Also, records were fragmented, and many kumu did not speak Hawaiian. However, Pukui, as a Bishop Museum researcher, supplied the translations (Stillman, 2001, 2007). In spite of this help, the situation posed a problem for kumu hula who wished to revive old dances authentically and to participate in the Festival. To overcome this barrier, the festival leaders (also well-known hula masters) selected one ancient chant for the competition. In several years of competition, the hula community collaborated on what they believed was an authentic expression of the chant (Stillman, 2001, 2007). Through participatory creativity, kumu began with the same chant, and from that starting point, created and taught individualized dance interpretations. The combination of scaffolding and collaborative learning among the hula community helped hālau students to learn and perform new interpretations of older forms of hula.

Another instructional innovation was the creation of training to develop future kumu hula (Hopkins & Erikson, 1982/2011). This approach was controversial because it differed from traditional training practices. However, kumu hula Maiki Aiu reintroduced hula protocols and encouraged students to be innovative (Kaeppler, 1993/1996). Aiu

taught ancient and modern forms of hula, developed new instructional practices such as note-taking, making hula implements, attire, and using traditional protocols (Shay, 2016). Also, Aiu revived the traditional graduation ritual. The graduating class of teachers has played a pivotal role in sustaining the present-day hula tradition. Others, such as Beamer (2001), encouraged students to learn about their culture and create new chants.

Hula as a means of expressing cultural identity continues to be important to Native Hawaiians to the present day. Yeh et al. (2021) interviewed Native Hawaiian high school students to better understand how they dealt with racial bias. The researchers found that the practice of hula helped them to affirm their sense of identity and cope with negative stereotypes of Hawaiians. Stillman (2021) questioned what it meant an authentic Hawaiian considering the influences of Westernized colonization. She noted the ongoing intergenerational conflict over the two forms of hula, and which one was the most authentic. Current generations of Hawaiians consider hula kahiko (ancient hula) as culturally superior to hula 'auana (modern hula) enjoyed by their parents and grandparents. Stillman observed that this phenomenon reflected the extent of colonization, when the notion of authenticity is a source of disagreement within a culture. Stillman, as well as Wilson-Hokowhitu (2019), noted that to preserve and strengthen cultural identity, it is acceptable to adopt diverse forms of knowledge, past and present.

Hula as a Modern Global Tradition. The study of hula recycling (Kaeppler, 2004) occurred over a decade ago. Therefore, if another stage of recycling existed, then recent studies suggest that it is the emergence of hula as a global tradition. Technological advances such as recorded broadcasts of the Merrie Monarch Hula Festival have created

visual records of performance as a research and educational tool for kumu hula and students (Stillman, 2001). Also, these broadcasts, viewed worldwide, have attracted international interest. Stillman (1999) attributed this growing interest due to globalization. The diversity of instructional settings has raised issues of how to transmit the knowledge yet maintain the cultural integrity of the hula.

    Instructional Settings Abroad. Hula is now an international phenomenon; however, kumu hula want to ensure that dances are performed correctly and that students understand the cultural context. Schools throughout the world regard Hawaii-based kumu hula as authentic sources of knowledge (Kaeppler, 2004; Stillman, 1999; Yaguchi, 2015). Since hula is now taught widely throughout the U.S., Japan, Mexico, and Europe, the hula instructors at these localities must assume a broader role. They must teach in an environment that is not Hawaiian (Stillman, 1999). This notion of teaching outside of the hālau space and outside of Hawaii is a radical departure from traditional teaching. Yaguchi (2015), in a study of hula, described a personal experience as a student in a Japanese hula studio. The researcher studied with a Japanese instructor who had a connection to a Hawaii-based kumu hula. The kumu hula taught the Japanese instructor who would then teach the Japanese students. All instruction of choreography and meaning was in Japanese. Yaguchi (2015) found that students expended considerable time and financial investment to pursue hula but still felt that they could not attain the idealized goal of a true Hawaiian paradise. In this case, hula was a commodity for Japanese students and served as a business enterprise for kumu hula.

Hula as a Health Intervention. In Hawaii, hula has been the subject of studies in disease prevention and wellness. Noting a lack of transdisciplinary research on behavioral interventions for Native Hawaiians, a group of researchers conducted a series of related studies using hula as a culturally based intervention for Native Hawaiians (Kaholokula, Look, Mabellos, et al., 2017; Kaholokula, Look, Mabellos et al., 2021). These studies sought to establish hula as a viable means to improve the health and well-being of Native Hawaiians. One underlying misperception they addressed was that hula was assumed to be entertainment rather than a demanding physical activity. These studies focused on community-based programs using culturally relevant practices. The results of the studies showed that hula in combination with health management education produced improved hypertension and a reduced risk of cardiovascular disease. Also, Loo et al. (2019) investigated the use of hula and its health benefits for breast cancer survivors of diverse ethnicities. The results of the pilot study showed that participants showed improvements in waist circumference, biomarker results, and mood. These studies show that the practice of hula results in increased health benefits for Native Hawaiians and the general population.

Inclusion of a kumu hula as an instructional designer and researcher for an experiment was an innovative concept. The studies included a kumu hula as researchers (Kaholokula, Look, Mabellos, et al., 2017; Kaholokula, Look, Mabellos et al., 2021; Kaholokula, et al., 2018; Walters et al., 2020) who developed the hula instruction protocol and served as cultural subject matter experts. Involvement of kumu hula were critical to ensuring the cultural legitimacy of the project as part of a community-based

approach (Kaholokula et al., 2018). Although the studies recognized the use of hula as an innovation for health intervention, the involvement of kumu hula and instruction in a scientific study was equally innovative.

Hula as Artistic Expression. For Hawaiians who live outside of Hawaii, hula has served as an artistic expression of isolation or diaspora. Tamaira (2018) described the artwork of a Hawaiian artist in San Francisco and the hula lineage with a renowned kumu hula. The interactive art was reflective of the journey of the artist to affirm an identity as a Native Hawaiian living away from Hawaii. Although the focus of this literature was on the artist and unique viewpoint, the artwork served as a form of instruction to those who viewed the exhibit that displayed stories of a hula genealogy.

In contrast, living outside of Hawaii provided the freedom to explore hula innovations without social constraints. Shaka (2015) explored the hula genealogy of one kumu hula, Patrick Makuakāne, whose mentor encouraged a tradition of innovation. Makuakāne created a new form of hula known as hula mua set to non-Hawaiian music (Shay, 2016). In 2000, Makuakāne presented a hula performance unlike any other seen before (Shaka, 2015). The performance narrative told of the conversion to Christianity from the Native Hawaiian viewpoint. The dance choreography included traditional types of hula, but also included the hula mua style of dance accompanied by techno or house dance music (Shaka, 2015). This creation challenged the perception of a commercialized hula stereotype and attempted to reclaim the history of Hawaii from a contemporary voice. Other kumu hula have embraced a contemporary approach to hula using a storytelling approach where dancers perform as actors (Kaeppler, 2004). Much

controversy exists regarding the extent of tradition exists in this approach; however, hula has had a tradition of storytelling (Kaeppler, 2004; Kaholokula et al., 2018). Although these innovations exist, it is unclear how these innovations have impacted their instructional approaches.

Instructional innovations and practices in dance, as defined earlier, are processes that result in something new and useful. The literature described how hula has evolved over time. Although it is evident that kumu hula played a crucial role in the evolution of hula, little is known about what instructional practices and approaches led to these changes. Kaeppler (2004) used the concept of recycling to illustrate how hula changed as society changed. Preserving the Hawaiian culture through the rediscovery of old ideas could be considered practical and new. The gap in the research is how kumu hula accomplished this feat.

Summary and Conclusions

This chapter began with an extensive review of dance education from a global perspective. This review revealed that a substantial amount of current research on dance instructional practices exists that address the tensions between the traditional and current, student-centered approaches. Studies addressed instructional approaches in a myriad of topics including multi-disciplinary curricula, integration of technology, and use of reflective teaching and learning strategies. Such practices could be considered innovative, as defined by Clapp (2017).

In sharp contrast, there is little information on hula and hula instruction, thus revealing a significant gap in the literature. Current knowledge, as reflected in research

studies, shows reliance on text-based historical literature. However, without this information, no means exists to connect the past with the present. Also, there is no link to contextualize the hula tradition globally or within the Hawaiian culture.

A research gap exists between the current studies in dance education and hula instruction. However, further analysis of the literature has revealed the obscurity of knowledge about hula instructional practices on several points. First, hula, or what is now known as hula, has been subjected to changes throughout history. Many changes were reactions to external forces that contributed to the upheaval of the Hawaiian culture. The studies suggested that a cultural norm of innovation existed; therefore, kumu hula made changes to hula. These revisions imply that changes in instruction occurred to implement these new forms of hula. However, historical accounts focus on what has happened in the past as an outcome or result. What is unknown is the instructional process that led to these changes.

Second, an ongoing tension exists between innovation and preservation of the past. This observation is a consistent theme with the global literature reviewed on dance education. Despite various cycles of suppression, the hula tradition continued in some form. This continuation required various modifications to the dance as well as contextual revisions, or recycling. Although kumu hula made changes to hula, there is disagreement in the hula community about the extent of these changes. Furthermore, it is unclear how kumu hula have transmitted knowledge in a manner that considered these tensions yet maintained the integrity of the dance to identify it uniquely as hula.

Third, the literature provided evidence that changes to hula occurred at the individual, group, and societal levels. Although the sharing of ideas and making continuous improvements align well with Hawaiian cultural values, what remains unknown is how some changes occurred at the individual level while other changes had a farther-reaching effect at the group and societal levels. Although there are a few biographical studies of kumu hula, there has been little attention given to how these individuals developed instructional practices as a collective endeavor to preserve the hula tradition. This study attempted to fill this gap by exploring the instructional practices of one kumu hula who has passed knowledge to the next generation. In this sense, this study approach considered the biography of an idea (i.e., the perpetuation of the tradition) by kumu hula who possess a shared hula genealogy.

Chapter 2 provided an exhaustive literature review of dance education, hula history, instruction, and innovations. The chapter described the literature search strategy, the conceptual framework, and identification of key concepts. Concluding the chapter was the summary and identification of the gap in the literature. Chapter 3 will describe the proposed research design to explore this gap. This chapter will explain the research design, rationale, and methodology. Also, this chapter will address my role as a researcher, data analysis, trustworthiness, and ethical considerations.

Chapter 3: Research Method

Introduction

This qualitative study explored the Indigenous teaching and learning practices through the voices of Native Hawaiian teachers, past and present, from traditional hula schools, or *hālau*. The purpose of this qualitative study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. To achieve this goal, I identified three specific activities for this qualitative study. First, this qualitative inquiry explored the historical perspectives and instructional practices of one Native Hawaiian master teacher of traditional dance, or *kumu hula*, through archival records. Second, this qualitative inquiry determined how the legacy of instructional approaches was transmitted to, and mediated by, successor teachers. Ultimately, this research was designed to discover the historical hula learning and instructional practices that might be considered innovative.

This chapter describes the research design. I begin with the research questions that identified the focus of this qualitative inquiry and a brief explanation of the central phenomenon. A summary for this approach follows a description of the method of inquiry. Next, I identify my role as a researcher and the challenges of my situatedness. The following discussion details my methodology, including participant selection, instrumentation, recruitment, data collection, and analysis. The next section addresses issues of trustworthiness and ethical procedures. This chapter concludes with a summary of salient points.

Research Design and Rationale

RQ: How have instructors, connected through a traditional hula school, approached instruction?

Sub-question 1: What are the key instructional practices represented in the stories of one kumu hula born before 1932 that transmit the Indigenous culture?

Sub-question 2: What are the key instructional practices of current hula instructors?

Sub-question 3: How do current hula instructors believe they may alter their instructional practices based on a knowledge of the stories shared by the kumu hula born before 1932?

As shown in Table 1, to answer the over-arching research question, I analyzed the archival records collection of one kumu hula born before 1932 and conducted interviews with current successor instructors. To answer Sub-question 1 (SQ1), I analyzed archival records and conducted interviews with current successor instructors to learn about this kumu hula. To answer Sub-question 2 (SQ2), I conducted interviews with the same instructors to learn about their current instructional practices. To answer Sub-question 3 (SQ3), I conducted a second round of interviews that were archival elucidation interviews with these current instructors. A detailed account of the interview questions used to answer the RQ are shown in Appendices B and C.

Table 1

Alignment of Data Analysis Sources to Research Questions

Research question	Archival records	Interviews
RQ	X	X
SQ1	X	X
SQ2		X
SQ3	X	X

Central Concepts/Phenomenon of the Qualitative Inquiry

This qualitative inquiry focused on the practices of one kumu hula born before 1932 and the perceptions of students in this shared hula lineage regarding the learning and instruction they employ as they teach or study hula. The purpose of this qualitative study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. This understanding is essential because societal changes reflected the predominant Western culture without consideration of Indigenous Native Hawaiian ways of knowing, being, and doing. These resulting tensions between Western and Indigenous Hawaiian perspectives have influenced what and how Native Hawaiian teachers instructed to perpetuate their cultural traditions (Imada, 2012; Kaeppler, 1993/1996, 2004).

Research Tradition

This qualitative inquiry explored the instructional approaches and practices used by one teacher and successors in a traditional hula school. These teachers represented

multiple generations of hula educators connected by one hula teaching tradition. Many

hula schools exist in Hawaii and throughout the world. Although these schools teach

common forms of movement and share certain cultural norms, interpretations vary based

on diverse teaching traditions (Emerson, 1909/1998; Kaeppler, 1993/1996, 2004). The

teachers in this qualitative inquiry shared a common source of knowledge; however, it

was likely that their instructional experiences differed due to different teaching contexts.

Such contexts may have encouraged innovation to integrate knowledge into new settings

yet maintain a tradition.

This qualitative inquiry used Indigenous research methodology as an overall

approach. Indigenous research methodology is defined as a paradigmatic approach that

reflects the Indigenous worldview (Kovach, 2019). Smith (2012), a seminal Indigenous

Maori scholar, described the frustration of Indigenous communities who shared their

cultural knowledge with Western researchers but received no benefit in return.

Indigenous scholars developed this methodology in reaction to such past practices where

Indigenous communities were subjected to research by outsiders (Dew et al., 2019).

Scholars that use Indigenous research methodology ultimately seek ways to benefit

Indigenous communities (Windchief & Ryan, 2019).

Windchief and Ryan (2019) named three characteristics in Indigenous research

methodologies that include relationship building, asking questions that will lead to

strengthening the community, and the use of reflection. Similarly, Singh and Major

(2017), as well as Salis Reyes (2019), noted that Indigenous research embodied values of

relationship and reciprocity. Such an approach influences the methods used, data

collection, and interpretation of results (Datta, 2018a; Kovach, 2019). Researchers select

research tools that benefit and protect the stories shared by the community (Datta, 2018a). Therefore, the methods used align with the specific Indigenous perspective to sustain the culture and the community taking part in the research.

A critical method in Indigenous research is the use of conversational interviews (Adams, 2018; Kovach, 2019) referred to as talk story in the Hawaiian culture (Datta, 2018a; Kovach, 2019). Gathering information in this manner is known in qualitative research as narrative inquiry (Kovach, 2019). Narrative inquiry is used to understand the experience of how people learn continuously in a relationship with others (Clandinin, 2013; Clandinin & Connelly, 2000). When people tell stories, they organize the events in a manner and sequence that will convey the experience in a meaningful way (Riessman, 2008). Such an experience is in the context of Deweyan philosophy (Dewey, 1938/1997) of interaction and continuity. In comparison, Clandinin (2013) interpreted this idea as a storytelling space consisting of time, place and relationship. However, Kovach (2019) noted that in an Indigenous approach, the conversational method is narrative that "(a) is linked to a particular tribal epistemology (or knowledge) situated within an Indigenous paradigm; (b) it is relational; (c) it is purposeful (most often involving a decolonizing aim); (d) it involves a particular protocol as determined by the epistemology and/or place; (e) it involves informality and flexibility; (f) it is collaborative and dialogic, and (g) it is reflexive" (p. 128).

This narrative began with teaching practices from the perspective of one teacher born before 1932 and continued to the present through the storied experiences of the students. In traditional Hawaiian hula schools or *hula hālau*, teachers train through an apprentice system. For this qualitative inquiry, the master hula teacher, or *kumu hula*, was

the founder of a hula school. Kumu means the source of learning or knowledge (Pukui & Elbert, 1986), so a kumu hula is a source of knowledge of traditional Hawaiian dance. To reach the kumu hula status, individuals must undergo rigorous training for many years. When a student reaches a level of mastery, the kumu hula may choose this individual as a successor. The community then recognizes the student as a kumu hula, qualified to teach hula in the tradition of the predecessor. In this qualitative inquiry, I focused on a first-generation kumu hula as well as second- and third-generations of successor instructors. To eliminate confusion, I refer to the first generation kumu hula as the *founder* in this qualitative inquiry. I refer to the successors who were the study participants as successors, protégées or instructors.

The story shared by the founder were open and discovered, initially, through archival documents; however, I anticipated that interviews with present-day instructors would help enrich and expand the narrative. Riessman (2008) remarked that many narrative sources exist beyond the spoken word, including visual and archival materials. Archival records may reveal lived experiences of the past (Morgan-Fleming et al., 2012), as well as incorporate the stories of several individuals to build a narrative (Huber & Whelan, 1999). The result was an interweaving of accounts from a variety of narrative sources to create a story of teaching and learning approaches and practices over time for one group of hula teachers connected through a common lineage.

Rationale for Chosen Tradition

This approach was appropriate for several reasons. A qualitative inquiry supplied a means to explore and understand the experience of hula teachers and their instructional approaches. I used Indigenous research methods that support the community values,

norms, and beliefs of Native Hawaiians as reflected in the triangulation of meaning (Meyer, 2008). Interaction with the community occurred through conversational interviews (Kovach, 2019). In Hawaii, this communication is known as talk story, which is unstructured dialog consisting of stories that promote the exchange of information (Kaholokula et al., 2018). This method was culturally relevant because it was a collaborative process that honored oral tradition and built relationships. Such a method protects the community and advocates trustworthiness (Datta, 2018a).

Stories explain phenomena, describe the everyday experience, and perpetuate cultural values. Hula, through chants, songs, and dance, shares these stories of Indigenous Hawaiian ways of being and doing. As a repository of knowledge, truths, and ideas, the hula may serve as a form of literature in the Hawaiian culture. Since narrative inquiry has disciplinary roots in the social sciences and literature (Patton, 2015), this assumption underpinned my research design. Also, this philosophical stance aligned with the Deweyan (Dewey, 1938/1997) notion of experience using the criteria of interaction and continuity (Clandinin, 2013; Clandinin & Rosiek, 2012). These teachers gained their expertise through interactive instructional practices. Practical knowledge gained through experience manifests in instructional approaches.

Furthermore, these experiences had continuity. As part of the Native Hawaiian community, the present-day instructors connected their hula lineage to one kumu hula who founded their hālau. They were related through their training, and their experiences existed on a continuum linking the past to the present and future. In the Native Hawaiian worldview, ancestors actively interact with the living; therefore, narrative was a means to link stories of one person in the past to the students who now teach and perpetuate this

knowledge. The use of talk story established relational situatedness (Clandinin, 2013) that was a natural context to explore narratives of innovation. Furthermore, the co-creation of a narrative may develop a relationship with the participants and result in transformation (Pinnegar & Daynes, 2012).

In the development of this research design, I determined that quantitative methods would not be suitable because I used an inductive rather than a deductive approach to explain the meaning of a phenomenon. I considered several qualitative methods, including case study, grounded theory, phenomenology, systems theory, and ethnography. These approaches focus on how people think, find meaning in their world, and articulate their experience in words rather than with numbers. However, the differences lie in the philosophical orientations of each approach. Case study research explores a contemporary social phenomenon in a bounded context (Yin, 2018). My topic of interest, although case centered (Riessman, 2008), carried an emphasis in teachings originating in the past and assumed that stories overlap and intertwine on a continuum. A grounded theory approach is used to explain an observed phenomenon (Glaser & Strauss, 1967; Miles & Huberman, 1994; Strauss & Corbin, 1990). As an exploratory study using archival data and interviews, I did not expect the emergence of a theory. Also, I intended to analyze stories as a whole rather than as fragmented themes (Riessman, 2008; Singh & Major, 2017). Phenomenology was considered because all the participants share a lineage of hula; however, their experiences, although linked, could not be considered a shared life event (Creswell, 2013; Moustakas, 1990; Patton, 2015). Nor was it my intent to investigate how these teachers functioned in a broader context as is prevalent in a systems theory approach (Bronfenbrenner, 2009; Patton, 2015). My topic of interest had certain

ethnographic qualities because of its study of a culture-sharing group (Geertz, 1973; Higginbottom et al., 2013; Hoey, 2014; Spradley, 1979). However, my research focus was Indigenous instructional approaches and practices rather than a study of the cultural beliefs and behaviors. An ethnography would be an undertaking beyond the time limitations of this study.

Role of the Researcher

This qualitative approach was a co-creative process between the researcher and participants (Clandinin, 2013; Clandinin & Connelly, 2000; Kovach, 2019; Lyons & LaBoskey, 2002; Riessman, 2008). This relationship implied that the role of the researcher was beyond that of a mere observer. For this qualitative inquiry, I functioned as an observer and participant. However, the extent of participation depended on the research activity and interpersonal factors (Patton, 2015). Insider and outsider perspectives did swing back and forth or occur at the same time (Spradley, 1980). One phase of data collection involved archival research, where I functioned primarily as an observer as I reviewed and analyzed archival materials. As I conducted interviews with teachers, I continued in my role as a participant-observer in developing the narrative. In this role, I engaged in the inquiry space while observing the context and details of the interaction (Clandinin & Connelly, 2000; Spradley, 1980). Tasks in this role included recruiting participants, conducting interviews, recording and transcribing each session, and analyzing the resulting data that I collected.

Singh and Major (2017) found from the literature that Indigenous researchers tend to fall under three general categories. One category includes Indigenous members who have lifelong knowledge of their community and culture. The second category consists of

non-Indigenous researchers from outside of the community and culture. The third category includes Indigenous members who are exploring their Indigenous identities as insiders and outsiders, seeking a sense of place. I consider myself part of the third category. I am a researcher who is an older adult female of Native Hawaiian and European-American ancestry. Although I received my formal schooling from U.S. mainland schools and universities, my cultural values and beliefs are deeply Hawaiian. Also, I have studied hula throughout my life. I am a hula student and member of a local hālau, or hula school. This situatedness provided me with opportunities as a cultural insider to gain access to community informants as well as cultural resources, including archival materials. However, the community that I studied was on a neighboring island. Since I am not a member of that local community, my role was more of a visiting insider (Dew et al., 2019). This subtle difference is important because I had to be sensitive to local cultural protocols and norms that are unique to this community of hula practitioners.

For my research, I gathered stories and information from teachers who were not connected to my lineage as a hula student, nor did I have any past professional relationships with them. There were no expected circumstances where relationships with the participants would result in a power conflict or struggle. However, Riessman (2008) warned of the obstacles researchers face when they perceive their work as empowering to the participants. Such efforts to help the marginalized may result in unintended consequences that neither reflect the experience of the individuals nor result in empowerment. Indigenous research methodology prescribes tools such as storytelling support the community and build trust (Datta, 2018a). Related to this concept is relational ethics (Clandinin, 2013) that informs narrative inquiry through the collaboration between

the researcher and participants (Lyons & LaBoskey, 2002). The participants must be involved in member checking of results.

Because I am a member of the Native Hawaiian culture and community, I did not assume I was free of bias. Such biases could cause me to overlook information or interpret ideas based on incorrect assumptions. This condition required a means to keep biases in check by exercising reflexivity (Dew et al., 2019; Kovach, 2019; Patton, 2015). I continually strived to observe my voice and the voices of participants. Lyons and LaBoskey (2002) remarked that attending to the collaborative relationship throughout the process is a critical concern in narrative inquiry. Continual introspection and self-examination of my efforts hopefully helped me to address issues as they arose. As part of my design for this project, I kept a journal of my observations, progress, and perceptions. Peer feedback on the work in progress helped me to reflect and identify potential blind spots.

Methodology

In this section, I describe the methodology for this qualitative inquiry. I begin by describing the participant selection logic. The additional components that follow are instrumentation, procedures for recruitment, participation, data collection, and the data analysis plan.

Participant Selection Logic

Population

My interest was in the instructional and learning strategies used by teachers of traditional Native Hawaiian dance. My design focused on the instructors connected one hula school or *hālau.* The school founder, now deceased, was an Indigenous Native

Hawaiian hula teacher who lived in Hawaii. The study population consisted of current instructors who traced their knowledge and learning to this founding teacher and were members of the Native Hawaiian community. These contemporary successors instructed in a variety of settings, including institutional education environments, as well as informal settings.

Sampling Strategy

This qualitative inquiry used purposive sampling. Qualitative research approaches use purposeful sampling to study a phenomenon in depth (Patton, 2015; Seidman, 2006). A sampling is purposeful because it is intentionally directed towards achieving an understanding of a specific topic of interest (Creswell, 2013; Patton, 2015).

In comparison to quantitative studies, qualitative samples tend to be small since the goal is to explain rather than generalize (Babbie, 2008; Creswell, 2013; Crounch & McKenzie, 2006; Patton, 2015). Many purposeful sampling strategies exist. For this qualitative inquiry, I utilized a sampling strategy using purposeful criterion and key knowledgeables (Patton, 2015) in the hula tradition. These experts included one kumu hula from the past (i.e., an informant represented through archival records) and present-day successor instructors. As key knowledgeables, these individuals were widely respected in the hula community, Hawaiian culture, and beyond. Although the archive helped by identifying current instructors, my design included snowball sampling (Patton, 2015) to locate additional participants that meet the purposeful criterion.

Selection Criteria

I sought participants who were present-day instructors as key knowledgeables (Patton, 2015) to continue shaping the narrative to the present. These informants provided

insights and observations of the instructional strategies of the founder and their practices through a series of interviews. Purposeful criteria included five elements. First, participants identified as members of the Native Hawaiian community. However, one participant was not Native Hawaiian, but grew up in the hālau and was considered a member of the community. Second, participants trained with founder or a successor of the hālau founder. Third, participants functioned in an instructor role. Fourth, participants could be native speakers of the Hawaiian language, but were willing to communicate primarily in English for this study. Finally, participants had to be willing to participate in a second interview, which is hereafter called an archival elucidation interview.

Participant Number or Cases

A review of the literature shows limited guidance regarding sample sizes for qualitative inquiry that draws on narrative design techniques. Sim et al. (2018), in their critique of sample size methodologies, noted the use of four different approaches in qualitative research. The researchers identified these as "rules of thumb, conceptual models, numerical guidelines derived from empirical studies, and statistical formulae" (p. 619). As a rule of thumb, Riessman (2008) noted that the most common practice involved interviews with one person. Also, it is possible to use more individuals to develop a shared story (Huber & Whelan, 1999). Several recent narrative studies illustrated numerical guidelines and showed the number of participants ranging from five (Hinojosa & Carney, 2016; Nsonwu, 2015) to 20 (O'Kane, 2016).

This study was in-depth and focused on a small group of Hawaiian hula instructional practitioners with links to a historical archive. Based on communication with the archive about the existing collections, it was feasible to identify and recruit three

to five participants for this study. Since the records in the archive reflected individuals born before 1932, it was possible, I reasoned, that these elder teachers trained successors for several generations. This information suggested that the potential interviewees could range in ages 40 to 70 years. In reality, participant ages ranged from 30 to 74. Participants in varied ages assured a balance, yet different perspectives (Rubin & Rubin, 2012). However, one mentor teacher may train and certify a few students, if any, over a lifetime. Also, the successor students may have, as instructors, trained another generation of instructors. I consulted with the archivist to find the best participants who fit the criteria and could supply information-rich cases. I believed that one to two in-depth interviews per participant would suffice. Therefore, with three to five participants, it was possible to conduct six to ten interviews. This approach considered the individuals who had either studied with directly the founder or descended from next generation of instructors of this hula lineage.

Saturation and Sample Size Relationship

Saturation is evident when the researcher observes that, in the process of data collection, new data is redundant (Baker et al., 2012; Guest et al., 2006; Lincoln & Guba, 1985; Mason, 2010). Although saturation appears to be a widely used practice in qualitative inquiry, the concept was not specifically developed for narrative inquiry. Since my qualitative inquiry is exploratory, it did not describe a phenomenon in its totality as one would see in a grounded theory study. In that respect, exhaustive data collection did not serve my research aim. To that end, I proposed an initial sample size of three to five participants based on rules of thumb and similar studies (Sim et al., 2018). Also, the existence of archival elucidation interviews and shadowed data (Morse, 2000)

impacted how quickly saturation occurred. As the study progressed through data collection and analysis, I re-evaluated the sample size to determine when saturation was achieved.

Instrumentation

This qualitative inquiry used archival records and interviews as data sources. The central research question is: How have instructors, connected through a traditional hula school, approached instruction? Because this was a qualitative inquiry design using Indigenous research methodology (Kovach, 2019), the goal was to encourage the participant to tell their story of experience. As the researcher who gathered data for this qualitative study, I was the key instrument. However, I designed a protocol to facilitate this collection process that resulted in the creation of field texts from interviews and the archival source.

The archival source (i.e., the study site) is a nonprofit educational organization dedicated to hula located on a neighboring island. A well-known hula master established the organization, and a successor teacher currently manages it. This organization is widely recognized as an authority and repository of the histories of hula and elder hula masters.

Researcher-developed Instruments

This qualitative inquiry design used two different methods of data collection in the form of interviews and archival records review. The first method was through interview research. These conversational interviews with participants in the form of storytelling (Kovach, 2019) provided continuity by connecting the past to the present. I developed the interview procedures and did not rely on interview questionnaires created

by other sources. Instead, I used guidance primarily from Rubin and Rubin (2012), Patton (2015), and Keats (2009) to create an interview protocol and guide. Rubin and Rubin (2012) provided suggestions for the process, beginning with the introductory statement, and ending with the closing statement. The interview guide, shown in Appendix D, includes a sample of the invitation. Also, the guide includes protocols for the initial interview and archival elucidation interviews, each including an introduction, interview, and a closing statement. I used the authorized IRB Informed Consent form verbatim and added an estimated interview time. Questions used for the initial interview appear in Appendix B. For the archival elucidation interviews, I used the guidance from Keats (2009) to develop questions. The interviews were based on the results of archival documentary analysis and were open-ended. The resulting questions are shown in Appendix C. Appendix F reveals how these interview questions align with the second sub-question, the third sub-question, and the conceptual framework. Initial interview questions asked instructors about their stories of learning hula to stories of their teaching experiences and perspectives. Archival elucidation interview questions continued this theme but in greater depth, culminating in reflective, open-ended questions to instructors about their role in transmitting knowledge to sustain the culture.

The second method of data collection was through archival research. I wrote field texts in the form of notes as I read and analyzed records. This activity was part of a rewriting process as described by Stanley (2017) and includes recording any item connected to the themes of my research topic. The result of this data collection was my archive of the archive (Stanley, 2017) that included what was most relevant. Based on the guidance from Stanley, I developed two instruments to make efficient use of the time in

reviewing archival records. At the time I developed these instruments, I assumed I would visit the archive in person. Instead, the archive gave me on-line access to records on an incremental basis. The first instrument, shown in Appendix G, reflected the scoping and mapping process originally planned for the first day in the archive. The purpose of scoping and mapping was to gain familiarity with the collection, who contributed, and the overall context. The second instrument, shown in Appendix H, was intended for use after the mapping and scoping phase. This instrument focused on document analysis needed to understand the structure, specific context, and voice expressed (Stanley, 2017). The processes for collection are described in the following section.

Procedures for Recruitment, Participation, and Data Collection

This section describes the procedures for recruitment, participation, and data collection. The processes shown were linked primarily to the research sub-questions. To gain a sense of the sequence of events, here is a summary of steps that occurred in this process. The first step was selecting the archival collection of one kumu hula. For the second step, I recruited and interviewed individuals connected to the kumu hula referenced in the selected archival collection. In the third step, I reviewed and analyzed the selected archival collection of the kumu hula. For the final step, I conducted archival elucidation interviews with the same participants.

After receiving IRB approval, I contacted the archive staff for help in selecting one archival collection for study. This activity was the first step of this process. Since the archival collections are categorized by specific kumu hula who were born before 1932, the final selection of a collection depended on the expectation of recruiting interview participants who were connected to the kumu hula represented in the collection. This

communication activity was part of an archival pre-entry phase known as "surveying the territory" (Stanley, 2017, p. 40). The archive staff aided me by providing suggestions of potential collections tied to current hula instructors. They supplied an inventory of records for one collection for me to review and determine if the contents were relevant to my study. Also, they provided the name of the person who is now the successor. The archive has mentioned other instructors who trained with the kumu hula named in the collection. Therefore, other instructors were identified through snowball sampling. A review of this collection inventory indicated that the records were relevant to the research question, i.e., records pertained to discussions about teaching, hula performances, oral histories, and instructional sessions. I tentatively selected this collection, and after receiving IRB approval, confirmed the availability of participants by contacting them directly. The archive organization agreed to assist me by providing participant contact information.

The research question was: How have instructors, connected through a traditional hula school, approached instruction? To answer this overall question, I developed three sub-questions to explore instruction past and present. For this study, three primary activities linked to these sub-questions, including initial interviews (step 2), archival records review and analysis (step 3), and archival elucidation interviews that involve joint viewing of archival materials (step 4). Although these activities are described separately in this section, these processes were integrated and interdependent, creating a continuous flow of data collection and analysis. The sub-questions herein illustrate the recruitment, participation, and data collection processes that aligned with the research question and sub-questions.

The first sub-question was: What are the key instructional practices represented in the stories of one kumu hula born before 1932 that transmit the Indigenous culture? This question corresponded to the third step of my process. To answer this question, I collected data in the form of field texts from the archival organization remotely since the archive was not open to the public.

Stanley (2017) noted that researchers assume their primary task is reading in the archive; however, it is the act of writing that was most crucial (De Certeau, 1998; Stanley, 2017). Stanley (2017) referred to such archival entry practices as *archigraphics*, meaning a series of interlinked activities involving "rewriting, writing, and their iterative relationship with different kinds of reading, including re-reading and surface reading" (p. 36). Through this practice, I created narrative field texts using the following process.

Scoping and Mapping

Since the archival facility was not open to the public at the time of data collection, they proposed an alternative plan. This plan involved uploading records, incrementally, to Vimeo. In response to this adjustment, I scoped and mapped the records, as they were available, using the guidelines developed by Stanley (2017). I relied on the inventory to get a sense of what the overall collection included. First, to scope the collection, I scanned the inventory contents such as audiovisual materials, written materials, and artifacts. Next, I mapped the collection to identify the collection organization, its boundaries, and overall themes. I noted any gaps in information as well as what should be recorded right away or revisited more in detail. For this initial review, I used the scoping and mapping worksheet shown in Appendix G that provided step by step guidance.

Documentary Analysis

The following days involved data collection concurrent with document analysis. The process involves deconstructing a text, analyzing its composition, and multi-level readings (Stanley, 2017). This combined activity was necessary since documents could not be reproduced from the archive. For each document in the collection, I collected and analyzed data using five components, as detailed by Stanley, that included the historical context during that time, the pre-text, text and inter-text, post-text, and historical context after the document. I recorded any gaps and inconsistencies that needed clarification from the interview participants. Also, I noted the relevancy of each document to the research sub-questions and the conceptual framework. I used the sample worksheet shown in Appendix H to record information based on the components identified by Stanley. A detailed explanation of each component follows in the data analysis section.

My original plan included a series of visits to the archival facility over a two-month period. However, due to an unforeseen closure, the archive organization instead agreed to upload the collection in increments. As a result, this phase took three months to complete. After reviewing each incremental upload in Vimeo, I debriefed the archive. Throughout this time, I kept a journal of my reflections and created interim research texts (Clandinin & Connelly, 2000) to ensure that my texts addressed the research questions. If clarification was needed, I contacted the archive for assistance. Also, I sought clarification through the archival elucidation interviews described later in this section.

The second sub-question was: What are the key instructional practices of the current hula instructors? I explored this question in the second step of my process. Initial interviews preceded the review activity of archival records. To answer this second sub-

question, I conducted initial interviews with three participants. After I confirmed which collection to use, I contacted the participants by email, inviting them for an interview. These individuals accepted the invitation. I then followed up with an email requesting their Informed Consent to participate along with a summary of the interview questions so that participants knew what to expect. The participants were present-day instructors who previously either studied with the founder or who trained with the successor. With IRB approval, I invited each participant for one to two in-depth interviews. These interviews were estimated to be 1 hour in duration.

I set up and conducted interviews using the interview guide described in the previous section. The interviews were conducted using Zoom. The initial interviews covered the questions delineated in the interview guide in Appendix D. For all interviews, I used an audio recording device and created a transcript of the session. Also, I wrote an interview summary. I used member checking to review these results, and the results contributed to narrative field texts. As needed, I followed up with the participant to clarify the results. Also, I provided transcripts to the participants before conducting the archival elucidation interviews.

The third sub-question was: How do current hula instructors believe they may alter their instructional practices based on a knowledge of the stories shared by the kumu hula born before 1932? To answer this sub-question, I interviewed participants as part of a joint viewing of selected archival records that I had analyzed as the fourth step in this process. I invited the participants from the initial interviews for these archival elucidation interviews. These sessions functioned as an extension of the initial interview and primed participants for further in-depth discussions of the instructional approaches. Based on the

document analysis and review of the initial interview transcripts, I anticipated gaps, inconsistencies, and questions related to instructional approaches that required explanation. Also, participants were free to bring and share notes, photos, or other memorabilia that expressed their experience. Providing the participants with the opportunity to present such texts encouraged a deeper understanding of their experience and invites narrative collaboration (Keats, 2009).

These archival elucidation interview sessions were an opportunity for participants to clarify, interpret, and further explore instructional approaches through the observation of archival records. This condition, known as vicarious witnessing (Keats, 2009), occurs when participants feel that they become part of an experience though immersion in the materials, such as video recordings. The participants engage in sense-making that prompts them to take further action in their community. Such interpretations led to their reconsideration of the initial interview responses, express insights into how knowledge has been transferred or modified, or re-discover approaches used by their predecessor. Review of these records elicited more in-depth participant responses and reflections of their current instructional practices. Also, participants referred to the experiences and perceptions of other instructors in the form of shadowed data (Morse, 2000; Sim et al., 2018). Questions for the archival elucidation interviews are included in Appendix C. As with the initial interview, I recorded the session and created a transcript as well as an interview summary. I used member checking to review these results, and the results contributed to narrative field texts.

I relied on the archival materials and the interview data to answer the primary question. When I discovered new information or gaps between data sources, I returned to

view the archival records or followed up with the participants to clarify results. A summary of data collection procedures appears as Appendix E. This table illustrates where, who, and how the data was collected, study exit process, and follow-up based on each data source and the research question.

Exiting the Study

Since relationships developed as I researched, an exit strategy was required (Patton, 2015). The dissertation completion will mark the end of this particular study. However, I expect continued involvement with the archive in the form of future studies. I have debriefed the archivist after each visit to report progress and to inform her of the next steps. After the completion of each interview, I shared the transcript and interview summary with the participants for their feedback. These were measures needed throughout the study to maintain a relationship with the participants. Also, this practice ensured that the narrative results reflected the experience of the founder, participants, and researcher. As I exited the study, I informed the archive and participants that my collection phase was complete and that I would notify them when I had results to share. I also advised them that their responses would remain anonymous by masking their identities in the final dissertation.

Data Analysis Plan

The purpose of this qualitative study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. The research question for this study was as follows: How have instructors, connected through a traditional hula school, approached instruction? I chose a qualitative inquiry approach for

this study. The study results depended on the information collected from interviews and the review of an archival collection.

Analysis Approach

As part of the analysis in this qualitative study, I examined essential elements that included how people told stories, what people considered worth telling, and the complexities of their experience (Rubin & Rubin, 2012). My analysis plan included the use of field texts created from archival observations, interview transcripts, interview notes, and my journal reflections. I used archival data and interviews to analyze and construct a narrative of learning within the culture (Polanyi, 1989). This situation created a unique challenge in finding ways to interpret stories from the past and present that result in an overarching narrative.

The analysis began at the onset of data collection. For interviews, this process involved the review of field notes and transcripts. For archival research, the analysis occurred as I scoped, mapped, and analyzed documents. Riessman (2008) described four analysis approaches for narrative inquiry, including thematic, structural, dialogic/performance, and visual analysis. I considered these approaches as a basis for narrative analysis. Researchers use thematic analysis for qualitative inquiry interview and archival research (Riessman, 2008; Tamboukou, 2017) to describe what was said. Structural analysis focuses on how the speaker communicates, explicit, or implied (Riessman, 2008). Dialogic/performative analysis interprets how people interact, and the multilayered context of the interaction (Riessman, 2008). Visual analysis uses a wide variety of data and allows the researcher the ability to analyze back and forth to identify themes (Riessman, 2008). These layers of meaning may include elements such as body

language, the audience, the cultural or historical context. All these dimensions helped to shape the resulting narrative.

I implemented these four approaches for the interview process through analysis of transcripts, field notes, and journal reflections. However, for archival research, more steps were needed to analyze data. Stanley (2017) developed a research tool to scope, collect, and analyze archival data. As mentioned previously, I designed a worksheet, shown in Appendix H, based on the model by Stanley (2017) to collect and analyze documents. There were five elements involved in archival document analysis (Stanley, 2017). The first was the broad historical context of the document that described what was happening at the time of its creation (Context1). The second was the situation that led to the creation of the document (Pre-text). The third element described the overall content, structure, and voice (Text and Intertext). The fourth element describes what happened after the document was created (Post-text). The last element is the broad historical context after the document was released (Context2). To allow further analysis, I added elements that summarize gaps, questions to ask participants, alignment to the research sub-questions, and alignment to the conceptual framework. This tool provided an organization of archival data to permit analysis, but further guidance was needed to analyze all types of data from a wide variety of sources.

Keats (2009), however, recognized the complexity of life experiences that participants express, in forms that are written, spoken, and visual. To help researchers better understand the meaning of such complexity, Keats (2009) developed a narrative analysis model that addressed the use of multiple texts. Such an analysis method was relevant for this study because I collected data and created field texts from transcripts and

a wide variety of archival formats, including written materials and multimedia materials.
The method involves a series of readings and re-readings to identify the various
dimensions of meanings from multiple texts. First, I reviewed the number and types of
texts each participant has provided, noting their attention to certain archival documents
and preferred modes of expression. Next, I conducted an initial reading of all the texts
and noted my overall impressions. After the initial reading, I engaged in specific reading
by identifying and analyzing parts of each story that relate to the research question. Next,
I conducted a visual reading of the content of the visual text and analyzed how
participants responded during the interview. Finally, through a relational reading, I
analyzed how texts were related, individually and between group members. This task
identified themes raised by the individual (intra-textual) and by the group (intertextual).

Type and Procedure for Coding

With such a wide array of data, no one method of coding exists. Saldana (2016)
described 26 ways to code data during the first cycle and remarked that more methods
exist. For a narrative inquiry, Saldana (2016) suggested nine possible coding methods,
including four that were explicitly related to literary and language methods. Although the
coding method should align with the research question and conceptual framework, it was
difficult to know in advance which method to use. Because I used recorded oral history
interviews and other diverse formats of archival records, my initial assumption was to
employ an open coding approach using a grounded theory model (Rubin & Rubin, 2012).
This line-by-line approach is also proper for cultural studies. However, Singh and Major
(2017) recommended that stories should be kept whole. Also, Riessman (2008) noted that
narrative inquiry design strives to keep a story intact with attention paid to the unique

context of time and place. Therefore, interpreting field texts required keeping the story whole instead of breaking the data into smaller units as in grounded theory. Saldana (2016) recommended that coding should occur as the researcher creates field texts. Given the vast array of data forms including interview transcripts, notes, journal entries, documents, photos, and video, I used an eclectic coding (Saldana, 2016) method for the first coding cycle. This method helped me to initially explore the data and later refine the number of codes for the second cycle to align with the research question.

Software Used for Analysis

I used both hand-coding and a QDA tool for my dissertation research. Hand coding was important because it provided a means to immerse myself in the data collected. I have used hand coding in the past to analyze data, but the process was tedious. It took many hours to set up the code matrices, figure out initial codes, then consolidate the list. Collection for my dissertation was more extensive since I used archival data as well as interview responses. Given the volume and variety of data sources, I decided that a QDA tool was necessary. Although qualitative data analysis (QDA) software cannot code data for researchers, such tools enhance productivity (Patton, 2015; Rubin & Rubin, 2012).

Discrepant Cases

Not all data collected conformed to expectations or plans, indicative of alternative explanations or negative cases (Patton, 2015). However, rather than dismiss these atypical patterns, I sought explanations in the data. In narrative inquiry, such investigation is critical because stories may reveal an individual perspective that would otherwise be overlooked or repressed (Riessman, 2008). Such a divergent view may

increase understanding of an event or individual. The field texts and subsequent research texts documented how I examined the data and interpreted results. I kept track and coded these discrepant cases as part of the analysis (Patton, 2015; Saldana, 2016). Also, I shared these findings as part of my interpretation of the results.

Issues of Trustworthiness

Clandinin and Connelly (2000) remarked that narrative inquirers must consider factors beyond validity, reliability, or generalizability to determine the study quality, with attention to the narrative. Through the practice of wakefulness, or continuous reflexivity (Patton, 2015), the researcher remains mindful of the process. Riessman (2008) noted the lack of established criteria for the trustworthiness for narrative inquiry and remarked that trustworthiness depended on two crucial components. One component is the story as told by the participant and analyzed by the researcher. The other component is the story told by the researcher. Researchers must rely on some criteria to evaluate the truthfulness of their study as well as persuade others (Riessman, 2008). This study design utilized multiple methods to ensure the trustworthiness of results. I considered the four dimensions of credibility, transferability, dependability, and confirmability (Lincoln, 2004; Lincoln & Guba, 1985). All these dimensions of trustworthiness applied to my dissertation.

Credibility is an indicator of how accurately the narrative reflects the stories told by the participants (Lincoln, 2004). This study has credibility because it described how Native Hawaiian hula teachers viewed their teaching and learning using their voices. Their words and ideas in the form of stories they told through archival records and interviews will reflected their authentic experience. Member checking was used to ensure

transcripts, verbatim and summative, were accurate. This practice was a vital part of my dissertation research design because it impacted the accuracy of the data (Poland, 2003; Rubin & Rubin, 2012) and the credibility of my sources.

Transferability means determining the application and usefulness of this study for other settings (Lincoln, 2004). I used thick description of results from each data collection source that covered teaching and learning from the founder to successor. The resulting narrative may help others in developing narratives for other Indigenous groups or formal education systems. Also, this study may supply a method for Indigenous communities to explore their archives in a way that will promote awareness of their culture.

Dependability refers to the logic of the research design (Lincoln, 2004). This study was dependable because it aligned with the research question, explained my situatedness, and utilized a conceptual framework that integrated Western and Native Hawaiian epistemologies. Also, I collected and triangulated data from a wide range of sources and settings.

Confirmability is the extent that the information is traceable to the original data collection sources (Lincoln, 2004). This study was confirmable because I used a response community (Clandinin & Connelly, 2000) and peer debriefing to review my work in progress. To further support confirmability, I kept data collection notes, a reflective journal, and summaries as an audit trail for my processes.

Ethical Procedures

My design included procedures that ensured the ethical treatment of participants and the information that they provide. These safeguards aligned with established research

practices, Walden IRB standards, as well as cultural norms and behavior. Ethical concerns applied at all phases of research and pertained to the archive as well as the interview participants. Since Indigenous research methodology is a key approach in this qualitative study, I paid attention to my role as an insider and outsider to the community (Smith, 2012; Smith et al., 2019).

Agreements for Access

To gain access to the archive and possible research participants, I communicated with the archive director. The archive director approved access on behalf of the archive organization. As an Indigenous researcher, I was accountable to the ethics of the community (Windchief & Ryan, 2019). Therefore, it was necessary to obtain permission because the archive represented the knowledge of the community (Kovach, 2019). The archive was temporarily closed the public, but records were available upon request. The Access and Use Agreement is included as Appendix I. Also, the names of present-day kumu hula who are connected to the founder were public.

Treatment of Human Participants

Institutional Permissions. Treatment of human participants is of paramount importance in any research study. This study adhered to Walden University IRB standards and was conducted in a manner as described in the IRB Application dated February 19, 2020. IRB approval was granted on March 23, 2020, reference number 03-23-20-0475062. A change request was submitted to IRB on June 23, 2020, to allow for remote archival access and for interviews to be in person or using Zoom. IRB approved this change on June 24, 2020.

Ethical Concerns Related to Recruitment. I reviewed the list of kumu hula whose records existed in the archive. I was not associated with these individuals, nor had I previously met them. Furthermore, I did not know any of the protégées. This circumstance positioned me as an outsider to the hula community connected to the archive. Given this situation, the archival director functioned as a gatekeeper to help identify potential interview participants. I contacted individuals in writing to request their participation. Appendix D shows a sample invitation. This document conforms to Walden IRB standards.

Kovach (2019) recommended that Indigenous researchers engage in some form of relational preparation before entering the community. As a graduate student, I visited the archive and met the director several years ago. Since that time, I have kept contact by attending public seminars presented by the archive, and through informal email and phone communications. Also, I have followed the activities of the archive through social media. This interaction helped familiarize me with the archival organization, the archive collection, and the community of hula educators and practitioners.

Although I am a cultural insider, I was an outsider to this local community. Smith (2012) noted that this evolving role throughout the study has advantages and challenges. Perceived power relations may vary. My role as a doctoral student could have intimidated some people (Smith, 2012). However, my position as a hula student who studies hula may have attracted interest and further involvement. Study of their kumu hula may have created a sense of responsibility to participate. I was sensitive to the range of these reactions and focused on building a relationship with the archive and those connected to it. Therefore, recruitment activities reflected a cooperative and non-coercive approach.

Participants understood that the research was of benefit (Datta, 2018a; Dew et al., 2019; Windchief & Ryan, 2019) to the archive as well as the hula community to raise awareness and illuminate understandings of innovative practices. Also, the knowledge gained may help other Native Hawaiian or other Indigenous communities. There was no other form of compensation. However, participant time was acknowledged and appreciated (Patton, 2015). Ownership and access to the information may be a concern (Lyons & LaBoskey, 2002; Patton, 2015). Before collecting data, I worked with participants on deciding who owns what information. However, I understand that the community owns the knowledge (Datta, 2018b). Therefore, I collaborated closely with the archive and interview participants to establish what information participants may access and review. Also, I will share the study results with the community after I complete the research. The participant invitation and Informed Consent identified such benefits.

Ethical Concerns Related to Data Collection Activities. Patton (2015) commented that archival records might provide a content-rich source of data to researchers that describe organizations or programs. However, Moore et al. (2017) viewed archival records to make sense of the lives of people. From this perspective, it is the responsibility of the researcher to attend to relational ethics throughout the process (Smith, 2012; Stanley, 2017). In a narrative inquiry, Clandinin and Connelly (2000) similarly noted that ethical issues might arise throughout the research process. Such ethical concerns are due to the evolving relationship between researcher and participants for narrative inquiry (Clandinin & Connelly, 2000; Lyons & LaBoskey, 2002; Riessman, 2008), archival research (Moore et al., 2017), and Indigenous research methodology

(Kovach, 2019; Singh & Major, 2017; Smith, 2012; Windchief & Ryan, 2019). This interaction intensifies during data collection when the researcher creates narrative field texts.

Upon gaining access to the archival space, I observed the rules and routines of the operation. I was unobtrusive as possible and respected the daily work of the archive (Tamboukou, 2017). Such consideration meant careful handling of records as well as compliance with archive policies on removal or reproduction of documents. Also, I ensured that any records that I copied, or quoted were subject to the same rules of confidentiality and anonymity as with interview participants. I understood that the archive voluntarily allowed me access to information regarding people past and present. This information was privileged and provided a link to teachers in the past and present. In this respect, I formed a relationship with the individuals recorded in the archive through their stories.

Likewise, I formed a relationship with present-day teachers through the interview process. As an Indigenous researcher, relationship building is a crucial step in this process (Windchief & Ryan, 2019). I advised participants before the interview that their participation was voluntary and that they could withdraw at any time. Adler and Adler (2003) warned that individuals might not participate because of access or resistance issues. Reluctant behavior can range from interview avoidance to fear of expressing an opinion. In the context of this study, a reluctant participant may be intimidated by an academic researcher. Another possibility is a participant who might alter a story to protect another person or use the interview as a confessional (Lyons & LaBoskey, 2002). In any case, a good strategy involved taking the time in the interview to build trust (Adler

& Adler, 2003; Kovach, 2019; Windchief & Ryan, 2019). In Native Hawaiian culture, it is customary to engage in casual discussion at length before addressing more pressing matters. For example, we would first talk about our family names and find if we shared common ancestors and birthplaces. Also, as the participant shares a story, it is a cultural norm for the listener to share their story. This collaboration is the nature of the conversational interviewing known as talk story (Kovach, 2019).

Another ethical concern related to transcription and what constituted an authentic representation of a dialog. Poland (2003), as well as Patton (2015), remarked that transcripts might be subject to alteration, editing, and omissions, resulting in misrepresented results. I used verbatim transcription as well as interview notes to create field texts. These field texts reflected the verbal and non-verbal language used by the participant to tell a story. Use of member checking eliminated concerns of accuracy. I informed participants of the natural pace and style of the spoken word (Poland, 2003). Likewise, with field texts from the archive, there may have been a concern that my observations were inaccurate. Again, some form of member checking from the archivist or individuals linked to the founder by lineage helped to sustain the authenticity of the narrative.

Treatment of Data

All study participants, including the founder, have masked identities to assure anonymity. I followed archive policies on the use of information, including attribution and reproduction. Ownership of stories is an ethical concern (Clandinin & Connelly, 2000). For Indigenous research, the community owns the findings because it is their knowledge (Datta, 2018b). For archival and interview data created as field texts,

participants may have access to notes and transcripts to provide feedback. This feedback process may extend into interim research texts as a means of further collaboration of the narrative. If individuals who were nonparticipants wish to access data, I will determine if such access complies with IRB standards as well as the interests of the research participants. If such access is beneficial or required, individuals will sign a confidentiality statement of nondisclosure. For interviews, I asked participants to advise me when they wished to keep specific information confidential. Although I anticipated that this research topic imposed a low risk, an interviewee told me something that might put another person in a negative light. In such a situation, the participant asked me to withhold this information in the study from publication. All information that I collected was subject to safeguards required by the Walden IRB Standards, including secure storage and backup of files. Also, I will maintain files for at least five years. In addition, I have obtained permission to use images to explain the theory Participatory Creativity (Clapp, 2017). A copy of this authorization appears as Appendix J.

Other Ethical Issues

In preparing to conduct research, I identified a wide variety of potential ethical issues related to narrative and Indigenous research methodology. In both these approaches, researchers form relationships with participants (Clandinin & Connelly, 2000; Kovach, 2019) and in the process, roles may shift between the two. At times the participant may take an active role in the inquiry; at other times, the researcher may assume a role as a participant. Clandinin and Connelly (2000) noted the need to protect participants and the information that they provided. However, honoring a participant request to withhold information may not free the researcher of its influence. An ongoing

challenge for the researcher is how to preserve a narrative without harming the participants while balancing the need to share research with a wider audience. Another issue that may arise is the idea that it is not just the participant who is the center of stories; there may be stories told of the researcher (Clandinin & Connelly, 2000; Datta, 2018b). Narrative researchers must be aware of this situation since it may alter the course of the research process. Finally, there may be a tendency on the part of the researcher to want to smooth out a narrative to create a positive ending. Clandinin and Connelly (2000) suggested exercising reflexivity in the form of wakefulness and the use of a response community to identify this potential hazard. The use of reflexivity throughout the study ensured that my research practices support and benefit the community (Dew et al., 2019).

Summary

In this chapter, I have detailed the process needed to investigate my research question, which is: How have instructors, connected through a traditional hula school, approached instruction? To answer this question, I used a qualitative inquiry approach using Indigenous research methodology that involved the development of a narrative through field texts based on archival and interview research. As a participant-observer, I identified and studied the records of one kumu hula, or founder, from one historical archive. I examined and analyzed archival records in the form of videos, audio recordings, photographs, and written documents to explore how this founder instructed in the past to sustain hula and Hawaiian culture. I recruited and interviewed three teachers who were successors of this founder. These interviews further expanded the narrative of instructional approaches by describing current practices and by reviewing archival materials that may influence those practices. I collected data and created field texts from

transcripts and a wide variety of archival formats, including written materials and multimedia materials. To interpret these words and images, I relied on a narrative analysis model that applied to multiple texts and considers thematic, visual, structural and performative/dialogic aspects. I used eclectic coding for the first cycle and determined the most appropriate method for the subsequent coding. I hand-coded as well as relied on QDA software in my analysis. I considered issues of trustworthiness as part of my design. Ethical concerns are an issue throughout the research process. Although I have identified potential issues before, during, and after data collection, I was sensitive to ongoing relational ethics inherent in Indigenous research and exercised reflexivity. Although I followed IRB standards, I continually monitored the research in the process to ensure that participants and the information that they provided were protected. With IRB approval, I conducted data collection.

Chapter 4: Results

Introduction

The purpose of this qualitative study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. The following research questions guided this study. The main research question was: How have instructors, connected through a traditional hula school, approached instruction? The sub-questions used in the study were:

- What are the key instructional practices represented in the stories of one kumu [teacher] hula born before 1932 that transmit the Indigenous culture?

- What are the key instructional practices of current hula instructors?

- How do current hula instructors believe they may alter their instructional practices based on a knowledge of the stories shared by the kumu hula born before 1932?

In this chapter, I report the results of my dissertation study. I begin by describing the setting for the study, participant demographics, data collection and analysis processes, and evidence of trustworthiness. I then present the study results, organizing my findings in relation the main research question and the sub-questions. I conclude Chapter 4 with a summary.

Setting

The setting for this study involved one hula school, or hālau, past and present, represented in the records of a historical archive organization and the teaching setting of the present-day successor hula school. The archive was a community-based, Native

Hawaiian organization. The mission of this historical archive was to preserve the past to share knowledge for future generations. The organization was a repository that documents the lives of elder hula masters, preserving their stories in digital form. The organization planned to develop an online library and a resource center to increase awareness and educate the public about hula and Hawaiian culture. Videos, photographs, memorabilia, and documents associated with many hula masters exist in this archive.

The archive collection selected for this study represented a highly respected hula master and teacher who founded a hula school. From that school, the present-day hālau, or hula school, continues as a successor school. The study participants connected their lineage to the founding school as students now teach at the present successor school. The current teachers were not biologically related. However, their relationship was familial. From the founder to the present, the teachers reflected a hula lineage spanning three generations.

For this qualitative study, all participants completed a series of individual interviews. Three participants completed two interviews each, a total of six interviews. The hula school founder (deceased) is identified as Aunty. Following Hawaiian cultural tradition, I used this naming convention to convey respect to her as an elder. The identities used for the interview participants were Participant 1 (P1), Participant 2 (P2), and Participant 3 (P3). All participants instructed hula outside formal educational settings; also, P1 taught hula at a local community college. Class locations included in private homes or rented spaces in the community. However, since March 2020, classes gradually moved to Zoom due to COVID-19 pandemic restrictions on the island.

Demographics

I recruited participants with the cooperation of the historical archive organization. The archive assisted by curating a collection best suited for this study based on the following criteria. First, the elder, born before 1932, was represented in the collection and taught hula. Second, the elder had at least one successor who currently teaches hula. The elder who founded the hālau, or school, represented in the archive collection is known as Aunty. The successor of Aunty led the present hālau. This successor, P1, was a master teacher. P1 was a close relative of Aunty. P1 had trained two hālau (school) instructors, who functioned as alaka'i or assistants. They were P2 and P3. For this study, all participants shared the same hula lineage, were female, and lived on the same island. All participants began their hula training as children. P1 and P3 were of Native Hawaiian ancestry; P2 identified her ancestry as Japanese Okinawan. As far as proficiency in the Hawaiian language, P1 completed 400-level language studies. The other two participants, P2 and P3, learned Hawaiian terms and phrases through hula training. Instruction was mostly in English. The number of years of hula study, years of teaching experience, and training levels are shown in Table 2.

Table 2

Participant Demographics

Instructor	Born	Began hula training	Began teaching	Highest level training
P1	1946	Age 3	Age 17	Kumu (teacher) hula, age 21
P2	1975	Age 5	Age 32	Kumu (teacher) hula, age 38
P3	1990	Age 9	Age 15	Alaka'i (assistant instructor), age 15

Note: According to archive records, the hālau (school) founder, known as Aunty, lived from 1928 to 2016. She began her hula training at age 17, began teaching at age 19, and completed her training as kumu hula in or about 1950. She taught until she died in 2016.

Participants' number of years of teaching ranged from 13 to 58 years, with an average of 28.6 years of teaching experience. Although each participant taught a specific age group, each one had the capability to teach students of all ages, ranging from age 3 to adult. The hālau, or school, was a non-profit organization; therefore, the teachers were unpaid volunteers. For public performances, the hālau, or school, established a for-profit LLC organization for its services to cover performance costs, such as hiring musicians. In addition to teaching hula, all participants had full-time professional careers. P1 taught in higher education, P2 in preschool education, and P3 in marketing. All three participants had undergraduate college degrees. P1 had a master's degree.

Data Collection

Data were collected using two methods: documentary analysis of archival records and online, in-depth interviews. Archival data collection occurred in the period between the initial interviews and the archival elucidation interviews. Due to COVID-19 pandemic restrictions, access to the archive was available using remote technology. Also, initial and archival elucidation interviews occurred remotely using Zoom. The entire data collection process extended over 7 months.

Initial Interviews

The initial interviewing process was 1 month in duration. I interviewed the three participants. The Interview Guide (Appendix D) served as the framework for the interviews. These three initial interviews, conducted in April 2020, ranged from 44 to 90 minutes. Interviews were conducted and recorded using Zoom. As a backup, I used a digital recorder. After each Zoom session, the recording was automatically uploaded to Otter.ai for transcription. I edited each transcript, correcting errors, and verified that the names matched the speakers' voice. I then emailed transcripts to each participant for member checking.

Archival Documentary Analysis

After completion of the initial interviews, the next step was to scope and map the archive collection (Appendix G) followed by the archival documentary analysis (see Appendix H). The original plan was to visit the archive on-site because the collection, although digitized, was not accessible through remote technology. The intended plan was to conduct the archival elucidation interviews on-site at the archive. However, in March 2020, the COVID-19 pandemic led to a statewide shutdown in Hawaii, restricting travel,

initiating stay-at-home orders, and causing closures in various business sectors. This shutdown included the archival organization on the neighboring island.

Since it was uncertain when the restrictions would end, I began discussions with the archive to find some means of accessing the records remotely. The archive agreed to create and provide access if I paid a research fee covering the costs to prepare and upload the records. At the onset, it was unclear how many records the archive could provide. The archive determined that they could not provide 100% of the collection immediately. However, they were willing to provide most of the records in increments, based on specific categories of activities and events: oral histories, then panel discussions, followed by the instructional and performance videos. This strategy was feasible because it allowed for access as soon as possible. It was unclear if they would provide images of hard copy documents such as photographs, newspaper articles, and memorabilia. They provided me with an inventory list of records in March 2019 to determine if this approach would cover adequate review and analysis of the collection. I made a change request to IRB in mid-June to allow for remote access to data and conduct the archival elucidation interviews on Zoom (instead of face-to-face). I received IRB approval on June 24, 2020.

The archive implemented this revised plan by uploading records incrementally. As a result of the scoping, mapping, and document analysis, the process took 3 months (i.e., July to September 2020). I obtained private access to archival records through Vimeo. I used the Worksheet in Appendix G to scope and map records. For recording the documentary analysis, I used the Worksheet in Appendix H. The documents and records I analyzed included oral histories, panel discussions, instructional and performance videos. Also, I analyzed one document that was a master's thesis completed by P1.

This change had an impact on data collection. First, I was not able to view the collection in its entirety in one session. Therefore, scoping and mapping the collection occurred when a batch of records was uploaded and available through the web-based platform. After scoping and mapping each batch, I conducted a documentary analysis. Altogether there were four batches of records uploaded for viewing from late June to early August 2020. After each viewing, I gave feedback to the archive regarding the content and quality of the records viewed. Also, after examining each batch, we determined the next group of records for upload. This process continued until I viewed most of the records listed in the inventory.

The records review included video recordings, scanned excerpts from a print book, and a thesis completed by P1. Through scoping, mapping, and documentary analysis, I determined when saturation occurred, i.e., there was no new information revealed from the records reviewed. For this reason, I determined that it was unnecessary to view more records such as old newspaper articles and photographs. I eliminated several records from further study because they were not relevant to the research topic.

The documentary analysis involved examining all selected records. After viewing each record, I recorded various data under the pre-determined categories shown on the documentary analysis spreadsheet in Appendix H. These categories included general information about each record. However, I analyzed each record for key concepts, gaps, inconsistencies, questions raised, alignment with the research sub-questions, and the conceptual framework. Also, I journaled my observations, highlighting key segments. Using the spreadsheet shown in Appendix H, I sorted the records to identify which ones best represented the instruction and transmission of cultural knowledge. Although there

were many to choose from, I selected four videos that aligned with the central research question and sub-questions. Two of the videos, one from an oral history interview and another from a panel discussion, conveyed the teaching philosophy of Aunty. The other two videos documented Aunty in action, teaching conference workshops. To make good use of interview time, I selected specific video segments for the participants to view. This step led to the development of interview questions used for the archival elucidation interviews.

Archival Elucidation Interviews

The COVID-19 pandemic restrictions affected the archival elucidation interview process. All participants agreed to Zoom interviews instead of face-to-face. However, I was concerned about the ease of sharing video segments from Vimeo while conducting the interview. To ensure that is video sharing was feasible, the archival staff and I tested Vimeo video segments while in a Zoom session. There were no technical problems or degradation. Also, to keep the interviews organized, I updated the Interview Guide that included questions and prompts for the video segments viewed (Appendix D). Some of the questions were specific to the participant, particularly if there were information gaps from the initial interview. However, the remainder of the questions were identical regarding viewing segments on workshop teaching and panel discussion.

I conducted the archival elucidation interviews in September and October 2020. These three interviews ranged in length from 76 minutes to 3 hours. The interviews were for long periods and complex due to the use of remote video segments. However, there was only one instance of technical failure. Due to a loss of connectivity, one participant was dropped from the Zoom session but improvised by calling me on her phone to

continue while her computer rebooted. The recording continued, and we were able to resume the session.

As with the initial round of interviews, each session was conducted and recorded in Zoom. As a backup, I used a digital recorder. Each recorded Zoom session was automatically uploaded to Otter.ai for transcription. I edited each transcript, correcting errors, and verified that the names matched the speaker's voice. I then emailed transcripts to each participant for member checking. Although the data collection process required numerous adjustments due to the COVID-19 limitations, I collected the required data as originally planned.

Data Analysis

Data analysis occurred during and after data collection. After completing each initial interview, I listened to the interview recordings several times to edit the transcripts. Then I emailed the edited transcripts to participants for member checking. While member checking was underway, I reviewed the recorded interview sessions, noting facial expressions, emotions, and reactions. I relied on Riessman (2008) for guidance to note any thematic, structural, performative/dialogic, and visual aspects for the reading of interview transcripts. I read each transcript several times, highlighting keywords and phrases connected to the research sub-questions. These segments conveyed information about the transmittal of cultural knowledge and instructional approaches past and present. Also, I marked preliminary codes. As I worked through the transcripts, I read my interview notes and reflections, highlighting my impressions and any observations during each session. I noted the gaps in the information that required follow-up with the

participants. Some of these items were minor clarifications, while other items were added as questions for the archival elucidation interview.

After the archival elucidation interviews, I analyzed these transcripts using the same process as with the initial interviews. After listening to these interviews several times for editing purposes, I sent them to each participant for member checking. I read each transcript, highlighting key passages, and noted any information, such as preliminary codes, connected to the research sub-questions. I reviewed my interview notes concurrently with this process, checking to see if information gaps were filled. Observing that no new information emerged, I determined that data saturation occurred, and data collection was complete.

After completing the data collection, I analyzed the transcripts using the initial and archival elucidation interviews for each participant. The purpose of this action was to gain an understanding of each participant's perspectives as a whole. Also, I was interested in learning through the archival elucidation interview process if the participant's views had evolved from the initial interviews. For this stage, and in addition to Riessman (2008), I relied on Keats (2009) for a framework to explore elucidative narrative texts in written, spoken, and visual forms.

I took the following steps as part of the coding process. For each participant, I reviewed the initial interview transcript first, then reviewed the archival elucidation interview transcript. I re-read these annotated transcripts, noting my previous impressions and preliminary codes. Next, I uploaded all the transcripts to MAXQDA. I was unsure of what the data would reveal after the uploading process. Therefore, I conducted exploratory first cycle coding, using open and in vivo codes to attune myself to the

perspective of each participant. I transferred notations as memos and checked to see if any preliminary codes needed adding. For the video segments used in the elucidation interviews, I wrote analytical memos and linked those to existing codes as recommended by Saldana (2016). I merged and regrouped codes by category, noting how codes aligned with research question and sub-questions. The merging and regrouping process resulted in three major code categories: process codes, values codes, and affective codes. I determined that affective codes fit under the values codes.

During this analysis, I wrote code memos throughout the coding cycle. These memos developed into a codebook to define each code and most subcodes. To maintain stories as a whole, I conducted another coding cycle to mark all narrative passages. This process revealed a total of 150 stories from the six interview transcripts, each containing one or more code categories. To validate coding, I reviewed all coded categories, checking for redundancies and duplicates. The process revealed the need to re-categorize several sub-codes to align with the research question. I identified the predominant themes for each participant (intra-text) and shared (inter-text) predominant themes. From these participant themes, I identified four individual and shared themes: cultural knowledge transmission, instructional approaches, life lessons beyond the hālau (school), and teaching challenges promote innovation. Figure 1 illustrates these emergent themes and sub-themes. I explain these themes in detail in the Results section.

Figure 1

Research Question with the Resulting Emergent Themes and Sub-themes
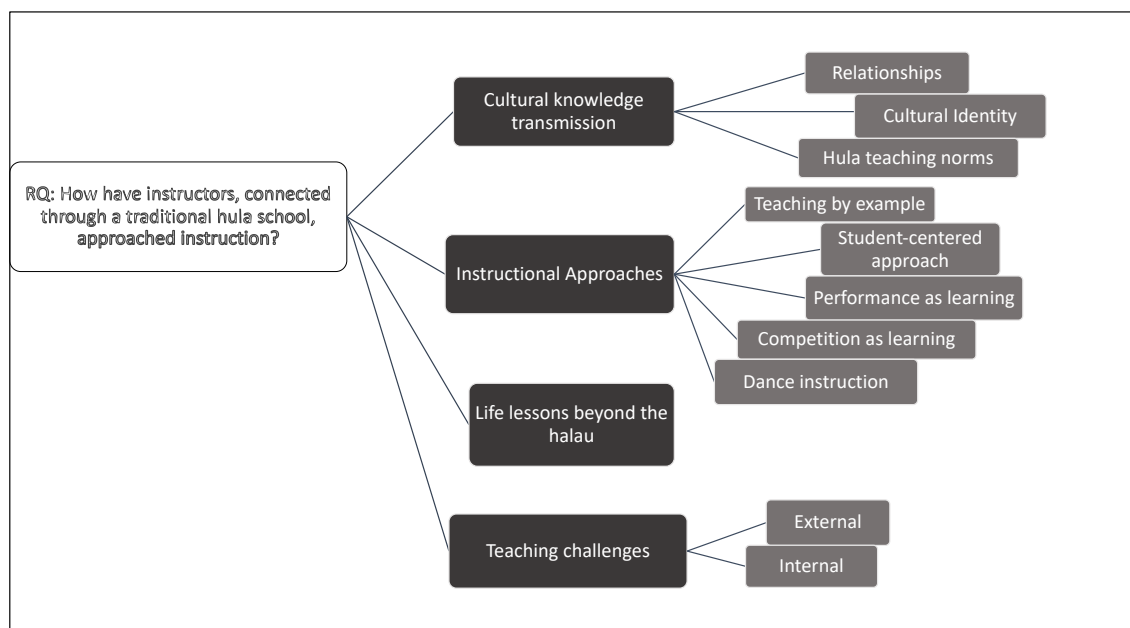
There was one discrepant case identified. One participant, P2, was not of Native Hawaiian ancestry. However, she reported that she was raised in Hawaii, immersed in hula and the Hawaiian culture. Because this individual completed the highest teacher training level (i.e., kumu hula), it was evident that the hālau (school) leader P1 had entrusted P2 with the responsibility to transmit the hula tradition and cultural knowledge on to students. Based on this fact, I included P2 in the participant pool since her involvement would add a diverse perspective to this research topic that would otherwise be overlooked (Riessman, 2008).

Trustworthiness

As a researcher and a member of the Native Hawaiian community, it is my kuleana, or responsibility, to present these shared stories with humility and integrity. This

study design utilized multiple methods to ensure the trustworthiness of the results. My

research methods supported the four dimensions of credibility, transferability,

dependability, and confirmability (Lincoln, 2004; Lincoln & Guba, 1985).

Credibility

This study has credibility. I conducted two in-depth interviews with each

participant. I found that the initial interview primed the participants for the archival

elucidation interviews, encouraging more depth and breadth in their responses. This

process helped establish our relationship, build trust, and find common ground in

communication. Time spent conducting archival documentary analysis helped me

increase my understanding of the relationships between the founder and the participants.

All these actions contributed to credibility because they provided a means to ensure that

my portrayal of their stories reflected their voices. I utilized member checking to ensure

transcripts, verbatim and summative, were accurate. I followed up with participants to

ask them to verify transcript information or explain any gaps identified. Also, I used

member checking to verify the accuracy of the quotations used in the Results section of

this chapter.

Transferability

Few studies, if any, address the instructional practices of Native Hawaiian kumu

hula. For that reason, this study may have transferability and prove useful for studies of

other hula schools, Indigenous groups, or formal education systems that have culture-

based curricula. To ensure transferability, I used a thick description of each data

collection source that covered teaching and learning from the founder to successor

teachers. Also, I documented all processes in the study to assist future researchers in pursuing similar studies.

Dependability

This study was dependable because it aligned with the research question, explained my position in the study, and utilized a conceptual framework that integrated Western and Native Hawaiian epistemologies. I have documented all the processes used in the research design. Also, I collected and triangulated data from a wide range of sources and settings, including archival records and interview transcripts.

Confirmability

The stories shared reflect the voices of people connected to the founder of one hula school. This study was confirmable because as I collected and analyzed data, I made sure that interview results reflected the participants' voices and not my opinions. In addition to reviews of drafts by my dissertation committee, I used several methods to maintain confirmability. Through the member checking process, participants reviewed transcripts as well as quotations to be used. My kumu hula (hula teacher) filled the role of response community representative by reviewing the draft results. Two colleagues, who are in higher education, assisted in the peer debriefing process to review my work in progress. To further support confirmability, I maintained data collection notes, a reflective journal, a data analysis log, and summaries as an audit trail for my processes.

Results

In this section, I describe the study results as heard through the voices of Aunty and the three participants. These results, organized by story themes that emerged from the data analysis, reflect individual and shared stories. The conceptual framework was a guide for interpreting the patterns and meanings that emerged.

Research Question

The central research question was: How have instructors, connected through a traditional hula school, approached instruction? The influence of Aunty and her legacy was evident in the rich and diverse knowledge she left through her archival collection and her instructors' memories. In the form of stories, these memories revealed four themes: cultural knowledge transmission, instructional approaches, life lessons beyond the hālau (school), and teaching challenges promote innovation (see Figure 2).

Cultural Knowledge Transmission

Transmitting cultural knowledge occurred by building relationships, sustaining a cultural identity through learning and teaching hula, and maintaining hula norms.

Relationships. According to archival records and interview participants, Aunty was respected for her commitment to others and maintaining lasting relationships. Relationship-building happened inside and outside of the hālau, or school. Family relationships, or 'ohana, play a central role in the Hawaiian culture. The stories told through the archival records and the voices of the participants reflected this value. P1 recalled how Aunty began her teaching career.

And in 1949, she started as a teacher or kumu, teaching and she was introduced to our family because she was the fiancé of my uncle, my dad's younger brother. My dad and his brother had 10 brothers and sisters, and with lots of children, it was a perfect place for her to start her hālau [school]. And so, myself and my older cousin, she's a year older than me. She and I were Aunty's first baby students. She was four and I was three. And of course, I have aunts older than me. So, my aunts became her teenage 'opio dancers, and also her wahine [women] dancers. So, all my aunts, my mother, and all the wahine or female members of my family were part of her hālau [school].

P1, when asked about how she decided to teach, her comment was "I was raised to be a teacher." Furthermore, she explained how hula dancing was part of her family's heritage.

I started at three years old. ... I didn't know that my mother was a hula dancer until I was an adult. And she never told us that she was a hula dancer. And so, my mother was very, very subtle in her ways. She was never open about anything she had. She just knew that she wanted her girls to dance hula. So, there was not a question about 'do you want to go to hula? You're going to hula' you know, until we got old enough to make a decision on whether we want to continue or not. And so, being the oldest of the three girls, I just kind of fell into it. I just fell into hula, and I loved dancing.

When P1 completed her training years later, with Aunty's blessing, she started her own hālau, or school. However, P1 remained involved with Aunty and her hālau school

activities. P2, an instructor for P1, explained that although these were two separate hālau, or schools, "they would do a lot of things together ... a lot of the performances." She described the connection "like a mother-daughter situation, even a family-type relationship." However, this knowledge transmission was also possible through students outside of the family who showed interest and commitment to hula. This latter condition describes how P2 and P3 first became involved with the hālau (school).

For P3, her introduction to hula came when she was in grade school, through the granddaughter of Aunty. However, she began her hula training and has remained with P1.

I connected with Aunty before I met P1 because Aunty's granddaughter was my best friend in elementary growing up. I used to go over to Aunty's house after school a lot and eat all her food. But it started off with that kind of relation[ship]. Just going over the house after school and seeing Aunty and everybody, the whole family. And then eventually I got curious on hula because my best friend who was her granddaughter also danced with her. So that's when I, hula-wise, got introduced to Aunty and her hula instruction. But when I went to see Aunty for the first time, because usually what happens is you show the teacher or explain to them like what you know or understand of hula. … So, I showed Aunty. And she then referred me to P1. I'm not quite sure how she divided, like split up, students. But because I feel P1 was her student. She helped P1 with gathering students. And so, I listened to P1 to start my hula instruction.

P3 joined the hālau, or school, as a result of her friendship with Aunty's granddaughter. Also, she showed interest. P3 added that once she started dancing, "there

was no stopping." She later learned that she came from a distinguished hula lineage in her own family. "My great aunt, actually. She taught a lot of kumu [teachers] like Frank Hewitt ... some really [well-] known kumu hulas. But I have never had a chance to meet my great aunt. She passed [away] before I was born."

P1 noted this family history and commented that "genealogy has a lot to do with dancers like P3. P3 has plenty aloha in her dancing, too. So rarely do you find dancers like her and students like her that really have that." This situation suggests that P3's interest in hula and teaching was due to her ancestral connection. Also, P3 remarked that "everybody, the family pretty much dances in the same hālau [school]," reflecting the high level of family involvement.

In comparison, P2 did not describe any ancestral ties to hula but began learning hula at age 5. She explained how she started with Aunty.

The way it worked back in the 80s was that when you were young, if you joined the hālau [school], you started off with Aunty. So, she got all the five-year-olds and the six-year-olds and seven-year-olds that wanted to join. And then once they reach a certain age, like 11, 12, between 10 and 12, then she moved them over to P1. And then P1 would take the girls when they were older, and then ūniki [graduation ritual] them as ʻōlapa [dancer] when they're teenagers.

According to P2, hula was a family activity. "My sister danced before me. But I also have second cousins who dance. ... And then I have a lot of younger cousins who've also danced hula when they were younger and through teenage years." She added,

"whenever we have a family party, there's always a handful of people who can get up and dance."

P2 and P3 have remained with the hālau, or school, because of their strong relationship with P1. P2 said that she valued dancing hula as a way "to all be together." She remarked, "I love them [Aunty and P1] so much." For P3, the hālau (school) relationship is essential to her, beyond dancing. "I love the connection I made with P1 and all my haumāna [students] and everybody else in the class. So, it became more of a bond and connection through hula than it was more than just about hula." Both P2 and P3 left to go to college on the mainland but rejoined the hālau, or school, after graduating. Building and maintaining relationships continues to be central to the lives of the instructors. This practice happens inside and outside of the hālau (school).

However, Aunty taught the value of relationship-building beyond the family ties. Archival records in the form of videos documented a wide variety of public hula performances and participation in community cultural and educational events. To make these connections with audiences, Aunty taught her students the importance of dancing in unity and conveying emotion by sharing aloha with audiences. P1 described how this ability strengthened relationships between dancers and Aunty while deepening her connection to hula.

> I've always had a hard time explaining what it was like to grow up in a hālau [school] and dancing for Aunty versus competitive dancing today. When I was growing up, you had to have a group of dancers that really danced well together, that you connected to each other, and you felt very close to each other. So, when

you danced, you danced together as one. And it was because you liked each other and you enjoyed each other and you became true sisters, and you loved each other. So, you have that flow between each other. And so, when I danced on the stage, I never danced for money. I always danced for Aunty for free. I never went out to dance professionally, although I was offered a couple of times to dance professionally. And I was offered to dance for other hālau [school] when I was a teenager. And I always told everybody 'I'm sorry I dance for my Aunty. I'll never leave her.' You know, always stayed with my Aunty, and I did. And so, I had some opportunities to really dance professionally, but I didn't have the feel. When I was with my Aunty, I had that real natural feeling, that feeling that you really love hula, you really embraced it with all your heart and soul.

P2 is an instructor under P1 but studied hula with Aunty as a child. She recalled the importance of connecting to the singing voice of Aunty and the dancers to unify the group. "As I grew older, I realized that you get energy off each other. The person singing can connect with the dancers and then vice versa." Loyalty and devotion to Aunty were evident as she described a time when a large, prestigious hālau (school) invited her to join. "I would never have left Aunty. I think what she said really, really touched me in a way that I knew that was the hālau [school] that I wanted to be part of. I still tear up thinking about it again."

P2 remembered the way Aunty taught students to appreciate each other and to extend this appreciation to other hula schools and to audiences.

When I think of, of what I learned from Aunty, of course, the hula. And I think a

lot of it was values for me, really. Even as a young child, I think I realized it, but

she would always tell us about [it]. Even when we're getting ready for

competition, competition doesn't matter. We don't dance to compete against

anybody else. Use that to share your aloha. Oh, she always said that when you

danced. And that's kind of what hula was all about for us. And I think conversely,

it's also about appreciating others, that there's not just one way to dance, there's

not just one way to the correct way or a better way. We have our way, another

hālau has their own way and we just want to share with each other.

Aunty exemplified the importance of building relationships within the family,

with and between students, and performances with audiences. P1, P2, and P2 perpetuate

this value through class instruction and performance activities where students learned

mutual support, trust, appreciation for others, and how to share aloha.

Cultural Identity. As the founder of the hula school, Aunty transmitted

knowledge and practices that contributed to cultural identity. Based on recorded oral

histories, documents in the archive, and the interviews with P1, Aunty transmitted

knowledge passed down to her from renowned hula masters. This knowledge came in the

form of stories and chants learned through hula. P1 summarized how Aunty gained the

cultural knowledge that was part of her identity.

She ''ūniki'd [graduated] with Lokalia Montgomery and that was after she had

studied with several other kumu [teachers]. And they're listed in my thesis. She

started with her aunt, Caroline Tuck Peters, and then Lena Guerrero. And then she

went to Lena Machado. And then she went to Lokalia Montgomery. And so Lokalia was a very, very strict teacher, but Aunty said that Lokalia really must have liked her. Because she had asked her kumu [teacher] Lokalia, if she could teach hula while she was going to classes with Lokalia. And Lokalia allowed her to do that. So, she was teaching while she was still being trained with Lokalia.

According to the oral history records, Aunty said she was Christian and could not participate in the traditional kuahu (altar) rituals that pre-dated Western contact. However, she still sought to learn those ancient hulas and studied with other hula masters to learn their traditions. In the words of Aunty regarding one teacher, "he taught a lot of stories about, you know, old stuff. But we didn't venture into old stuff." She then added, "we didn't do anything that was kapu [sacred] per se. Like, you know, we didn't pray, or we didn't offer. We didn't have a kuahu. We didn't do that. Just learn this [hula]."

As part of a graduate school thesis, P1 sought to record the genealogy of the chants and stories passed on from Aunty.

I had a chance to ask Aunty: Who did she learn these chants from? But she never told us who she learned chants from. And she would if we had asked, but you never asked your kumu [teacher] unless your kumu is willing to share that kind of information with you. And so, in writing my thesis that gave me what I needed to ask her: who taught you these chants? And who taught you these songs? So, it was kind of a way for me to approach her and ask her who have taught her these chants. Because she taught us many chants, and, of course, many songs over the years, but we really didn't know specifically. And so, to us, it didn't really matter

who taught her. ... I know that she had a reason to keep this information from us, and just pass on what she felt was important for us to, to learn and to pass on to the next generation.

Although Aunty received cultural knowledge through extensive hula training with several renowned teachers, she taught those traditional practices that aligned with her personal beliefs and those that she felt were important to pass on to students. In this case, her Christian beliefs shaped her instructional approaches and determined which stories were worthy of transmission, if and when appropriate. By mediating the traditions of the past with the social constraints of her time, Aunty passed on knowledge that she believed would be relevant for the future.

As part of preserving the past, Aunty transmitted cultural knowledge through practices related to hula performance in the form of material culture. According to P2, Aunty taught students how to make ti (plant) leaf skirts and make leis (garlands). "She and P1, outside of teaching us the dancing, teaching us all these other things, lei making, ti leaf skirt making-- all of those kinds of things. It's just an integral part of being in a hālau [school]."

Included in the material culture was the use of hula implements and instruments to accompany the dancers. As the successor, P1 received many treasured possessions of Aunty. Aunty gave the first gift to P1 during her childhood. According to P1, this gift represented Aunty's recognition of P1 as a successor.

I was told, when I was an adult, that she had given me her lei palaoa [whale's tooth pendant] that was presented to her by her kumu [teacher] Lokalia. And I

was kind of, I was in shock, actually. I said, 'Mom, how come Aunty gave that to me?' I was only about eight years old. So, Mom says, she gave that to me when I was eight years old. And I said, 'How could she give that to me when I was just a little kid,' you know? And Mom said, 'I was supposed to hold it for you for when you became old enough.' So, what does that tell me? What does that tell my mom? That she believes that I will carry on for her after she's gone. No, nobody told me this until I was an adult.

At the time of her death, Aunty bequeathed to P1 many items of cultural significance that symbolized the transmission of knowledge and the authority to teach hula. Also, these items reflected the great affection Aunty had for P1. Included were vintage implements used for hula performance, several pahu drums, and a well-used 'ukulele (instrument). The 'ukulele, in particular, reminded P1 of Aunty.

I have her 'ukulele. It's a small little Martin [name of maker]. He is tiny like this. And she used to play this little Martin. That one came to me too, you know, let me show you. [shows LM the 'ukulele] It's really funny. Okay, look at this case. Like, ancient, you know! She used this 'ukulele forever. And so, I said, 'Oh, poor thing, this ukulele,' and even the latch over here you see--how rusted. It's all rusty and all crooked. ... You can barely latch it, to hold the cover. So anyway, she gave me this too. And this 'ukulele really is too funny. But she had it redone. ... This little thing makes this beautiful loud sound. I mean, it's a beautiful 'ukulele, and it's Aunty because she's tiny. And then she left me some, some 'uli'ulis [feathered rattles], you know, and some implements, old implements, you know, and so on.

Beyond material possessions, Aunty passed down values that defined Hawaiian identity by example. P1 described Aunty as a person of "humility and hard work. Aunty was both of those two things. Very humble. And very low profile." P1 recalled Aunty telling students:

> Aunty always said to us, you don't need to tell anybody how good a dancer you are. People are gonna come to you and say you're a beautiful dancer. So, in other words, you don't need to brag about yourself or talk about yourself.

In words and actions, Aunty embodied the spirit of aloha. All three instructors remembered how Aunty taught that enduring value central to Hawaiian culture and identity. When performing on the stage, Aunty encouraged students to show their aloha. P1 explained:

> But we as dancers knew that what we were doing was part of our heritage, our culture. And that in itself gave you so much pride and aloha in what you were doing. Aunty always, always transmitted that to us, in the way we behaved on stage, and the way we conducted ourselves. The way we spoke, the way we presented ourselves. Always with class. Always with aloha. Never speak unkindly about anyone. All the other hālau [school] that you come into contact with-- always maika'i loa [very good]. Never to criticize, never. Everything positive. That was Aunty's way.

This value of sharing aloha was deeply impressed upon instructors P2 and P3. P2 noted that Aunty did not always talk about it, but "you could just see from the way she taught us and the way she treated other people. She always had that aloha in her heart."

P2 is mindful of this value as she teaches. "So that's something that I really try to teach the kids when I'm teaching. So, we always tell them expression, smile, bend, but show your aloha." P2 recalled how this helped her to express her feelings as a dancer.

I guess growing up with hula, it kind of taught me to look at people individually. With Aunty and P1 it was about dancing together, and dancing as a hālau [school]. But I remember they used to talk to us a lot about sharing your own aloha and expressing your feelings through dance.

Unlike P1 and P2, P3 did not study directly with Aunty but clearly understood what it meant to share aloha. For P3, sharing aloha meant helping students and including them, even when they were struggling to learn. "You want to take them under your wings and teach them even more and help them grow further." In her experience, dance performances were a way for her to show aloha to audiences by teaching them about the Hawaiian culture:

I do have a passion for hula dancing. I think that's why I've been in hula for so long. Because I enjoy it, I enjoy the feeling I get going on stage and you know, dancing for everybody. and teaching them, you know, our culture.

Training to Teach Hula. Embedded in cultural identity is the process of learning to teach hula. This process is a result of training over many years. P1 distinguished how hula training differs from Westernized teacher education.

We don't go to school to become a teacher like the Western school system [where] you go through college [and] they teach you different methods of teaching. So as a kumu [teacher], you have to grow up first as a student, learn all

the materials, learn all the words, and then try to teach your students. So, we learn. We are self-taught.

P3, who began learning the hula at age 9, admitted that "when I first started, it was really bad." She then added, "as long as you stick to hula, you'll get better and better." P3 explained the training progression.

So basically, you start off as a dancer and then a chanter, and then a pahu drum and then an alaka'i [assistant instructor]. So, there's all these different stages that you go through. And I would say that one was probably the most intense, in regard to having to learn so much at once. Because we have to learn all these different chants, hula numbers, the words and everything. It was more intense than I would say a competition would be, but it helped to instill a lot of new hula skills. And I love that actually.

In her experience, she began as a student but took on more responsibility after completing her first Queen Lili'uokalani Keiki Hula Competition (hereafter referred to as Keiki Hula).

We usually ask our/her students after they graduate Keiki Hula [if] they want to help with Keiki Hula class, and then it kind of moves up from there. So, as you keep moving up and getting older and older, you start teaching an older class after that. So that's kind of how it started. After I graduated from Keiki Hula, I was tasked with helping the younger classes.

As P3 took on more responsibility, she learned to teach. As she explains, by teaching others, she learned more about hula and gained cultural knowledge.

So once P1felt that I was ready to begin teaching classes, that's when a lot of the also my learning came into play. I think teaching helps instill more of the things that you teach now, so through teaching, I was definitely able to learn a lot more. We also did ''ūniki [graduation], which is a process that you go through in a hālau [school] to help graduate from different steps.

P3 explained her current instructor role in the hālau, or school, as "alaka'i, which is an assistant teacher to the kumu [teacher]." Having graduated through various steps, she explained that:

You have to go through that in order to become an alaka'i [assistant instructor]. And then you also have to go through that to become a kumu hula. So, a lot of people don't realize that you can't just open up your own hālau [school] just because you want. You have to receive some kind of approval from another kumu hula through this process, which you call 'ūniki, and you have to graduate from the 'ūniki process to become a kumu hula. So, I'm sure people can just start up the hālau [school], but in the hula community, it would be frowned upon if you didn't have some kind of certification from a previous hula teacher.

This latter statement from P3 reflects the cultural norm of the hula community to maintain a tradition of training and enforce a standard of mastery. P2 also recognized this standard as she reflected on her role in the hālau, or school. Although she had graduated as a kumu hula (hula teacher), she teaches as an alaka'i (assistant instructor), stating that she "did not feel ready to become a kumu [teacher] to have that title." As with P3, her training occurred gradually over many years.

I wanted to go further in hula. Then shortly after that, I started helping her teach her keiki [child] classes on Saturdays. Within a couple years, I was just coming to help, so I would help with the little ones. They started maybe from five, six. And then a couple years after that, I would help with the keiki hula girls. So, after that, she got a group of ladies that were coming to help. And so, I think from that, then she started to form an ''ūniki [graduation] group, because I think she saw that there were enough ladies that were interested that wanted to go further. So yes, that was about a three-year or maybe even four-year process from the time we first started until the time we 'ūniki'd [graduated].

One interesting fact that emerged from the data was that, unlike P1 and P3, who are of Native Hawaiian ancestry, P2 is Japanese-Okinawan. However, P2 made it clear that the Hawaiian culture is part of her identity and had always felt included as part of the hālau [school]. Like P1 and P3, P2 feels it was vital for her to sustain the Hawaiian culture.

When I went away, it was always my intention to come back. … And a lot of that was because of the Hawaiian culture, but also the aloha that people have for all cultures, here. I'm sure that there's divergence from that at some points but I feel like Hawaiian is the host culture, and that should be definitely continued, that should be passed down from generation to generation. And it's getting stronger. And I'm so happy about that. Even though I'm not Hawaiian I remember the first time I went to McDonald's, and I heard a mother talking to her son in Hawaiian, and I that just made me so proud. That to live in a place that I can value ... that we

can all live in a place where we appreciate that about each other, even if they're

not the same culture.

Hula Teaching Norms. As part of her teaching approach, Aunty instilled positive

behavioral norms in students by example. According to the oral history archival records

of Aunty and the recollections of P1, the basis was a combination of individual work

ethic and norms based on cultural values.

Individual Work Ethic. These norms consisted of hard work, dedication to hula,

and discipline. P1 described the desire of Aunty to be a "real hula teacher" and "wanted

hula to be her life." The family supported this decision to dedicate her life to teaching

hula.

> Hula came first before anything else, before her family, before her husband,
>
> before her children. And Uncle knew that, and so it was okay with him because he
>
> loved her. He would do anything for her. And she told him, 'I'm telling you now,
>
> I'm not a cook, and whatever you're going to eat is going to come out of a can.' He
>
> said he was okay with that.

With that dedication to hula came a high level of discipline. When Aunty and her

dancers performed at hula shows, she demonstrated by example what she believed was

positive behavior for her students. P1 recalled the consistent routine after each show that

took place through the years.

> You're a hula dancer, you go out, you do your performances, you do your work.
>
> You go eat afterwards and you go home. ... No more of this going out together
>
> and cavorting around, going night clubbing as a group, you know. You just go

out, do your dance, do your show, and then go eat afterwards and go home. So, I

grew up with that.

According to the instructors, discipline and hard work remained a part of their

work ethic. P1 maintains the same show performance routine as with Aunty.

Until today, as old as I am, having to go do my show. Work hard, make sure we

have our programs. And we practice our shows, no matter if we do the songs, the

same songs every show. I always have a practice of the show in the morning on

Saturday morning. So, we go hula. Then we have the show. It's Saturday night.

After we pau [finished] the show, I have my dinner at my favorite restaurant, and

I come home. I go home. I don't go anywhere. Because by the time you're pau

[done], it's a long day.

Cultural Norms. Aunty taught students specific behavioral norms that were

important to learn the hula and to promote a knowledge flow. According to archival

records and the instructors, these learning behaviors included observation, memorization,

and reflexivity. Archival recordings revealed that Aunty placed a great deal of emphasis

on the practice of 'hamau ka leo' (silence the voice) as part of student learning. At first

glance, it may seem that this phrase resembles the adage that children should be seen and

not heard. However, P1 explained that the norm of hāmau ka leo, or silence the voice,

teaches students to learn more deeply "by listening and learn by observing. And hāmau

ka leo [silence the voice]. Keep, you know, keep your words to yourself. Keep your

opinions to yourself." In traditional hula training, students were not allowed to ask

questions. Aunty was trained in this manner. In an archival video showing Aunty teaching workshop students, she explained:

> When I learned it, my kumu [teacher], who was a hula master, Lokalia Montgomery, we didn't write anything. We needed to keep it in here [index fingers touch temples]. So, whatever she's saying to us, we have to have it here [fingers touch temples]. And we don't ask questions. If we were to ask her something, she would say 'What did I tell you?' And you're thinking, what did she tell me? But you know, that was the way we were trained.

> P1 remarked that Aunty used hāmau ka leo (silence the voice) to help students develop their observation skills and focus their attention.

> You got to watch, you got to observe. She's sort of like forcing you to learn, and study it clearly and closely. So, you can pick it up. Because the more you put yourself into that mode, the more you're going to remember. If it's fed to you, you're not gonna remember it as much. But if you have to put your own energy into it, and you have to really pay attention, and really listen and really watch, you're not gonna forget.

The instructors acknowledged this practice as an essential teaching and learning tool. Both P2 and P3 acknowledged that hāmau ka leo (silence the voice) continued as a norm of behavior for students, with some modification. P2 said that when Aunty and P1 taught class, "it was always hāmau ka leo [silence the voice]." However, P1 had later revised this process to allow for questions.

And in the old days, that's how it was. You never asked a question. And I tend to have that same style of teaching. I try to remember that I'm not in the old era of how it was in the old days. Today's students are very different. They're used to asking questions. ... But ... I keep it controlled because -- and I try to explain to them that -- if you have to ask the question, it means that you're not ready for it, because you should teach yourself and you should learn yourself.

P1 added that it was the teacher's responsibility to monitor students and anticipate what they need to know. This view suggested that there was an intuitive relationship that develops between teacher and student.

When the kids asked me questions, oh, I get that feeling like, don't ask questions, because you're not there yet. When I feel that you're ready for the answer, I'm going to give you the answer without you even asking the question. Because they know that we're at the point in your lesson that you need to know the answer to the question. ... And of course, we get into that situation when you have lots of students and your focus is kind of dispersed. You may miss those kinds of signs in a regular class. But if you're not in a class that's a real serious class of learners, then you shouldn't miss those kinds of cues. You got to be able to pick up those cues because these serious learners are there to learn from you. When you're in that mode you should be able to connect and interact very freely and openly without having to speak.

From that perspective, P3 explained that hāmau ka leo [silence the voice] was to develop in students the practice of listening as a "discipline, and waiting your turn to

speak, when you're spoken to." The instructors enforced this norm. P3 noted times when students would interrupt P1 and the consequences.

> There's been a couple times where we had new students come in, and they would blurt things in the middle of like [P1 talking]. ... And a couple of times, P1 had to put them in their place. And I just felt so badly. Oh, if only they knew that they're not supposed to just talk out of turn, especially when Kumu [teacher] was talking ... we never blurt things out while we're dancing or ask questions just while we're dancing. We learn. And then at the end of it, we can ask questions.

As P1 stated previously, if students observed and listened actively, they would remember more. She recalled how Aunty routinely did hula shows for the public without a program. At the time, P1, age 11, was expected to perform any dance from memory without notice.

> She expected you, even if you didn't dance the song for a while. She's going to put that song on the program, you have to drop, at a drop of the hat, know your choreography, because we never practiced. Because we had so many with so many shows, if she felt like throwing in a song that she really liked today, and we never did it for like a couple months, when you get on that stage, she expects you to know it. Your mind has to be really clear. And your mind has to have to have a good memory. And that all comes with loving to dance hula.

P2 and P3 both commented that current students must rely on memorization and little written down. P3 explained that the only exception was when students learn a chant for "memorizing the words, but then we have to put the paper away eventually, once we

have the words memorized." P2 offered a similar response but added that Aunty and P1 devised a method to help students remember dance movements.

> When they [Aunty and P1] choreograph the songs that they were taught, the hand motions correspond literally to the word in the song, in the mele. So, as they [students] learn the words, that will help them remember the motions. Because they know when we say pua [flower], it's going to be a pua motion. When you say kaua [you and I], it's going to be an emotion. So, I think we use that also to help them remember.

In addition to this strategy, P2 mentioned how she encouraged memorization through playing a game. "Sometimes, we'll see if they can answer questions about the song so that'll help them remember the meaning of the song."

According to P1, Aunty expected others to figure things out on their own. By learning hāmau ka leo (silence the voice) and focused listening, students could create space in their minds for reflection.

> Aunty was just that type of person. I'm not going to tell you. You have to find out for yourself. You have to find your own answers too. And she would tell me you know, as I grew older, I was in my 40s, she would say 'Ho'olohe 'oe, nana 'oe' [listen, observe]. So, you have to listen. And you have to watch. Observe. And she would say 'you will learn all the lessons in life.' So again, she was a riddle. ... She wasn't going to tell you the answers and she never did.

This view applied to learning the hula as well. P2 noted that the practice of figuring things out on one's own still carried over to present-day teaching. "You're

expected to just pick it up. Pick it up as you go." P1 summarized what she learned from Aunty, expressing the importance of listening skills needed for reflection to answer life's questions.

> You know what happens when you're able to learn in silence? You're able to find yourself, find what's inside you and find that sense of, of discovery. You're discovering yourself. Do you really like this? Or don't you know? And when you're silent that way, you learn to hear yourself. Hear what's in your head and what's in your heart, and then your head and your heart will someday join together. And that is who you become just by being able to listen to yourself. Today people don't know how to listen. You got to tell them, listen, pay attention, you! Listen! But that's the start of learning. Got to be able to listen. That's how you learn to listen, about who you are, what you want, what do you love. What you don't like. The true sense of who you are, basically, you learn it through silence. That's what I learned in hula.

> Cultural knowledge transmission was an ongoing process for the P1, P2, and P3. This transmission took the form of teaching traditional forms of hula, where cultural knowledge was embedded. However, the transmission of cultural values and norms reflected how teachers modeled the behaviors and the functional aspects of the hālau [school]. As the leader of the hālau [school], P1 carried forward the cultural values of Aunty that stressed the importance of relationships, maintaining cultural identity, and teaching behavioral norms such as discipline, memorization, and observation. Consistent with the ʻae kai conceptual framework, P1 has kept the spirit of teachings such as hāmau

ka leo (silence the voice) in a manner that has adapted to the current needs of the students. The current instructional approaches gave evidence of adaptations that could be considered innovation.

Instructional Approaches

Aunty developed instructional approaches that transmitted Native Hawaiian culture and provided a philosophy of teaching that aligned with Hawaiian values. From this philosophy emerged an internal hālau (school) culture that included teaching by example, creating a student-centered approach, using performance and competitions to promote learning, and developing instructional methods. P1, as well as instructors P2 and P3, continued to utilize instructional strategies developed by Aunty.

Teaching by Example. P1 remarked that as a student, she felt secure when she was with Aunty. This feeling of safety allowed P1 to express herself as a dancer. According to P1, this was due to the teachings of Aunty and described her approach.

> She doesn't say anything to you. She doesn't say much. But just watching her and how she behaves, how she talks, how she treats people, how she chooses her words very carefully. She's very careful about how she can use one word to describe a hundred words. That's the beauty of my Aunty. She can touch your soul with one word, or one look. One look. I love it. You know hula people, you just give them one look, and you know exactly what they're talking about.

P2 said that Aunty taught through example and showed "aloha in her heart always." Like P1, P2 observed how Aunty was mindful of her words and actions. "She didn't always talk about it. But you could just see from the way she taught us and the way

she treated other people. She always had that aloha in her heart." As an expression of aloha, Aunty developed and communicated several sayings that became guiding principles for her hula teaching legacy.

Aunty's ability to relate to her students had a significant influence on P1. Teaching by example continued through P1, as described by P2 and P3. P3 summarized how P1 sets a standard of a teacher and someone who cares for her students.

> P1, she's always very nurturing when it comes to her students and how they feel when they get embarrassed. Or if they're having a hard time, she'll always embrace them. I think she likes the ones that have a more difficult time or that, you know, are not exactly perfect. She loves seeing them improve and she's very nurturing and how she teaches her students. And outside of hula, I know that I can go to P1 for anything and talk to her about any issues in life, or anything. It's not just she's my hula teacher and we only talk about hula like nothing at all. We have a personal bond and I love that about P1. She builds a personal bond with each of her students. It's not just okay, I'm your kumu [teacher], you're my student, that's it. So, I think that's why a lot of students that are still here. Because it's not just about hula, because we can go to any hālau [school] to learn hula. But it was about the personal bond and connection we made with her as a kumu [teacher].

P2 offered her insights as to what she has learned from P1. She explained how P1 had taught her to teach the students in a pono, or balanced way.

> She's taught me a lot about that a lot about how to do things pono [balanced], in a very pono [balanced] way. I mean, hula is very important, but she's also made

sure that kids develop in lots of different ways in their education. No matter how young they are, you can always impress upon them that they are going to college, things like that. She really cares about the kids as people also. And take all those things into consideration when you're making decisions about how to teach or how to, to schedule time. Or how to, even like events, how to do it in a pono [balanced] way, as pono [balanced] as you can. Thinking about the families, about the children, and then about like us as staff members. And 'alaka'i [assistant instructor], you know? I mean, that's something she really shows [is] her aloha in everything she does, as well. She really takes all of that into consideration.

As instructors, P3 and P2 have learned, by the example of P1, how to teach students in a nurturing, balanced way. They saw how P1 encouraged her students to think of personal growth beyond the hālau, or school. At the same time, they noted how P1 considers how hālau school activities affected the students in class and outside. P2 and P3 appreciated P1 not just because she was their kumu (teacher) but because she took a personal interest in them.

Heart and Soul*.* According to P1, Aunty believed that students should learn to dance with heart and soul. "She taught how you dance with your heart, heart and soul. That was one of one of her messages. ... That's all that mattered." Furthermore, Aunty practiced this belief as a teacher. P1 reflected:

She really put her whole heart and soul into hula. Because to survive as a kumu [teacher] who never spoke Hawaiian, but she understood Hawaiian. Because her grandparents spoke Hawaiian to her. And to go out and seek the resources that

you need to continue practicing hula because you love it so much. It was a real struggle for her.

Emotion for Every Motion. Related to the saying of heart and soul was the idea of emotion embodied in the dancer. P1 explained, "that's heart and soul, emotion for every motion." P3 remembered that "Aunty was all about emotions" and internalized this saying.

> I think the most important thing that she [Aunty] taught ... is that hula isn't meant to be a comparison against others. It's all about the emotion and how you are and how you feel as a dancer, how confident you are as a dancer, how you portray yourself as a dancer.

Never Say No*.* P1 recalled how Aunty was always willing to help others. Aunty made it clear to P1 that it was important to be positive and have a can-do attitude.

> Aunty always said to me 'never say no.' And I never said no until after she passed away and I thought she's not around anymore. Maybe I could say no once in a while. Especially when it comes to like people who ask for performances, you know, programs if there's so many of them. It's hard when you have to prepare the kids and all, but she never said no to anyone until the day she died. She was always available. You know, I don't think I'll ever beat her in that in that area. I got to say no once in a while, you know. But she never let anything get in the way of her love for hula.

The never-say-no attitude had an impact on instructors such as P2, who echoed a similar perspective.

I'm really glad P1 talks to us a lot about Aunty. You know, she had even before

Aunty passed away. She would always talk to us about what she learned and how

Aunty was. But that one thing was, if somebody asks you something, you never

say no. No matter how busy you are, how much you don't think you can do it.

You just don't say no, you just say yes to everything. So, she lived that way, all

the way till her last her last day.

Don't Compare. Because Aunty was positive and conducted herself as an

example to her students, she discouraged behaviors involving the criticism of others,

particularly other hula teachers and schools. In an archival video recording of one of her

final workshops, she strongly cautioned students:

Never say anything bad about the other kumu [teacher]. When you say something

bad about the next kumu [teacher], it haunts you. A lifetime haunt. You don't

want that. No, I'm just sharing that with you folks. Even if it's 'oh, this one's

better than that,' even if we feel something, we don't say nothing, because we are

our best friends. So, if I didn't like you or if I'm jealous of your dancing, I'm not

gonna tell anybody. They'll go back and say [something]. And then you're gonna

be bogged down. It's all negative energy. You no more time for that nonsense.

Although Aunty gave this advice to workshop students who taught hula outside of

Hawaii, it was evident that this was an enduring standard of conduct for Aunty's hālau

(school) students. P2 studied hula with Aunty as a child. After viewing this video

segment, P2 reacted by saying:

Even for Aunty and P1, always hāmau ka leo [silence the voice]. You talk when

you when you need to, but there's some things that just shouldn't be. And

definitely never comparing different kumu [teacher]. That was a big no-no. That's

just not something we ever heard them doing. You know, it just never even

occurred to us, occurred to me as a child, to even think that way, to compare. I

mean, when you watch other hālau [school] you're like, 'oh, that's cool,' or, 'oh, I

really like that.' But it's never to compare it to what each other is doing or what

you're doing. It's just to support what each other does. But that's the way, you

know. It kind of comes back to the way you conduct yourself outside of hula is

just as important to the way you conduct yourself in class. And the way you

choose to treat people. That is just as important as when you're dancing hula. And

I felt like she lived that from what I saw, you know. She did.

Student-centered Approach. Aunty's hula training was in a traditional manner

where students were not to ask questions and had to learn by observing. This norm was

enforced strictly and would suggest that such practices were conducive to a teacher-

centered approach. In contrast, Aunty developed a teaching approach and philosophy that

focused on her students. Archival video records documenting one conference panel

discussion revealed how Aunty approached teaching. In this video, she addressed other

hula teachers in the audience.

But the important thing that I want to share with you it's not who I am, who my

instructors were, but the philosophy of each one of them. It's so different. And

you, because you have the responsibility of teaching others. You need to know

what you can present, what you can force on them, and what you cannot. But the

bottom line is we cannot force whatever we believe in to our haumāna [students].

They have to love it. In the beginning, when you teach, you want everything to be

so perfect so fast. Then you learn. You know, that's not quite the right way

because each of us have our own minds, our own feelings. And so many of

learning how to teach the hula comes from the children themselves. You know,

they're, they are our challenges. I learned from them.

From this narrative, it was evident that Aunty embraced a student-centered

approach. P1 viewed this video segment. When asked about her most important aspect of

teaching, she replied, "what I have learned over the years as a teacher is your students are

your best teachers." P1 expressed her approach as a work in progress.

I have used my students as one of my teachers in how to teach. And you have to

pay attention to them. Because they are going to help you be a great teacher.

Because if they're not getting it and you don't recognize it, I'm not getting it. ... I

teach the motions, teach the hand, foot, the movements. But how do you teach

someone to love hula? That's the biggest lesson that you can teach as a kumu

[teacher]. How do you teach them to love it? Aunty was really good at it, I'll tell

you. And I'm still working at it, you know? And to be able to recognize and each

child and each student. Which ones are there to learn how to love hula, and which

ones just, you know, want to learn hula?

After viewing this video, P2 concurred by saying that "I think for both of them [Aunty and P1], changing the way they do things for the students to help the students more is, is something that they practice." P2 uses a similar approach.

You can't force kids. You can just teach them, and you can share with them. But you can't force them to love the hula, but that's something that's kind of internal in them. And it's just as much as I can to try to share what I love about the hula with them. And if they love it, then it'll spark, hopefully. I want it to spark something in them too. So, they continue on, they want to learn more.

P3 commented that Aunty wanted her students to dance together but at the same time recognized the individuality of each person. This concept was important because Aunty encouraged her students to love hula.

The thing I think she really instilled in all of us that we all have our unique hula styles. So, when we're like, super robotical when it comes to dancing, it's because we're trying to make sure we're synchronized and everything. It takes away from the passion of hula.

In another video showing Aunty teaching a workshop, Aunty tells the participants, "we dance to hula not to impress people but to express the story." According to P2, Aunty emphasized the importance of individual expression in dancing hula.

I guess growing up with hula, it taught me to look at people individually. With Aunty and P1, it was about dancing together, and dancing as a hālau [school]. But from whatever, I remember they used to talk to us a lot about sharing your own aloha and expressing your feelings through dance. So, I think I grew up with that

idea that everybody has special things inside of them that they deserve to be able to express.

In the classroom, Aunty sought ways to make learning enjoyable for students. P1 recalled her experience as a student and how Aunty changed up routines to keep students alert and engaged. Even when classwork became tedious, she would do something unexpected.

She would do these crazy things. If we were tired and we don't want to dance, you know? And she'd see that. She wouldn't get aggressive or angry. What she would do with her little 'ukulele, she would play faster and faster and faster, until we would go back and forth. And we just look at each other [and] we start laughing So she made it more fun. And helped us to realize that she has more energy than we do, because she can go all day, and she can sing all day. But you couldn't dance at that speed all day. So, you better dance nice and bend your knees. We just had so much fun trying to figure out how she would handle situations like that. So, she had a good, she had a nice way of handling situations.

P2 remembered her time with Aunty when she was a young child. She associated her experience as a student of Aunty as fun.

So, I just I remember hula being like this really, really fun. A lot of songs she would choose, I remember this one. It was so cute. It was about a mynah bird. So, for our performance, we had to wear black tights and a yellow shirt and have on a beak on our head. And, you know about mynah birds and it was so cute. You know, I remember having a lot of fun.

P3 gave several examples of how P1 has maintained and extended a student-centered approach in the hālau (school). She commented how P1 recognized individuality in learners and cited her experience as a student.

One of the things I really liked about P1 was being able to be myself through hula, not trying to be like the girl right next to me and look exactly like her. I could be me and still be in sync with her.

P3 noted that P1 was sensitive to the individual needs of each student and devised strategies to help challenge them at any level. P3 remarked that this practice as a student empowered the learners. For her, this partner work as a student under the guidance of P1 evolved into teaching practice.

During class time, she understands that sometimes it can get really tedious . ... She'll break us up into partners so the partners can help each other. If she realizes that a girl or somebody is having a hard time, she'll usually take a dancer that knows the words, who knows the hands or feet, and have them help that person on the side. She does love to instill more of a camaraderie where we help teach each other. It's not just teaching from her. She'll start it off but then she wants us to help each other as well during the process. There's been many times and -- I think that's where my teaching skills came into place. Because she slowly started allowing me, 'Okay P3, why don't you go help so and so. She just started, she didn't learn the first word, go take her on the side and go over her feet. She's having a hard time with the kaholo or like the, whatever it is.' It started off, just small little things like that. I think at the end P1 really wants to have every dancer

become a teacher in a sense. And to just feel confident in themselves, and that's why she gives us the opportunities to help others.

Both P3 and P2 commented that P1 welcomed feedback from her students. P3 mentioned that P1 was receptive to ideas from the students and "likes to involve her haumāna [students] in the songs that they learn, even when it comes to motions." As P2 described her approach, it was clear that she embraced the same philosophy as Aunty and P1.

I've learned a lot from these kids. And also, to look at each child individually. It's not always easy to do, especially when our hālau [school] got much bigger. But I think it's forced me to really focus on connecting with the kids more. To really look at them for who they are. ... It's a nice feeling when you're in the class and you feel connected to these kids. And you feel like as they're learning from you, you're also learning from them. Like how you can do things better, how I can try and do things better, as well. And I love the history and the stories. I really just enjoy sharing that with the kids as I teach. You know, it's wonderful for me to be able to share that and to relive it every time I teach them as well.

Monitoring Learning. The use of focused observation plays a vital role in monitoring the progress of learning. Aunty watched each child, determining what and how they needed to learn. This action further suggested a student-centered approach. However, P2 described this ability as intuitive.

It always seemed to me that Aunty was also very intuitive with her students. She could kind of tell when they really needed extra help. And she could tell when

they just needed encouragement, they just needed to relax, and just kind of let

themselves like experience it. And not tense, not feel so anxious about it. And so,

from the classes that I've seen her teach, she would approach it differently,

depending on how she read the students. How she saw that they were dancing.

Aunty assessed learning by observing individual students. However, she

monitored the progress of the entire class as well. By using observation, she accelerated

the learning if students were ready. After viewing an archival record of Aunty teaching a

workshop to hula teachers in an accelerated manner, P1 commented:

Aunty studies the class really well and she moves with the class. ... If she thinks

the class can just pick it up with just watching, she'll throw it in there. And I'm

kind of pretty much like that too. You know cuz [*sic*] it's sort of like, Oh, this is

taking too long. And you can see them, you know, they can do it right. So, you

just fall into it. And then you just have them pick it up because they're able to. It

makes learning much more interesting, too.

By watching students individually and collectively, Aunty adjusted her teaching

to accommodate the needs of students. Also, by assessing the progress of their learning,

Aunty moved the class along at a pace to keep students engaged in learning.

P1 explained that this skill learned as a student applies to teaching. That skill,

according to P1, developed because "growing up in hula taught me about body

language." P2 commented that Aunty and P1 possessed the ability to read the body

language of their students. "It's amazing how they can tell the difference between whether

somebody just needs to review it more, or whether she actually needs to stop the class and actually review it more slowly."

P2 added that she used a similar technique when she taught her students, who are young children. "If they can do it by themselves, and even if they make a mistake, if they can keep going, I think that's a pretty good indication that they know it pretty well, and we tell them, everybody makes mistakes sometimes."

Since the instructors used a student-centered approach, they made adjustments to their instruction rather than correct them. Said P1, "I don't like to correct because when you choreograph or, you do something, you have a path already in mind. When somebody changes it, it throws everything off. So, you can guide them."

P3 added that she modeled her teaching after P1 and described how she knew students were learning. She gave an example of how she and P1 assessed how quickly students learned in class.

> So usually, we would have a back line and a front line. The tendency is for the backline to just follow the front line and not have to memorize the motions as much. But there's no getting away around it here at our hālau [school], because my kumu [teacher] switches the lines. So, once we both learn the songs, she'll switch the line in the back row [to] become the front row. And when placed in the front, there's really no trying to follow somebody because you're in the front, unless you make it super obvious, and you're turning around watching people. But that's what really pushes people to learn the chants because we're all placed in a position to be in the front eventually. ... So that's why P1 likes to switch it up.

Because that's her way of knowing. For me, I learned from her. That's my way of

knowing if they actually learned it.

Finally, P1 monitored students to determine if they were ready to advance to a

higher level of learning. "When they start as a student, as a haumāna, as they grow up,

you already recognize that in them. And you can tell, you can read. So that's where Aunty

and I are. We're readers of body language." P1 observed her students as they developed

and saw their potential.

As they get old enough, then you teach them how to pa'i [drum]. You teach them

the different ways, the different beats that go with a different pa'i. And then you

see if they're there. They're embracing it. And then you allow them to pa'i for the

other classes. You know, their ʻoli [chant] voice. They slowly grow into it. Like

P2 and P3. They're wonderful hoʻopaʻa [chanter]. So, you recognize that in them

already. ... So that's part of what a kumu [teacher] is, to recognize in your students

who has the ability, who has the interest, who wants to be a kumu [teacher] one

day.

The instructors continued to teach using a student-centered approach established

by Aunty. Using focused observation, they adjusted their instruction to meet the needs of

each student. To assess student learning, they studied each student to determine if they

needed to make further instructional adjustments. As the leader of the hālau (school), P1

watched the development of students and evaluated their potential to learn more and

eventually take on higher leadership roles in the hālau (school).

Performance as learning. According to the oral history account documented in the archival records, Aunty performed as a young person in hula dance troupes for several Waikiki shows. During the post-World War II period, these productions materialized when Hawaii was a strategic base for the U.S Military, and tourism was beginning to expand. This situation created an increased demand by visitors for entertainment in the form of hula shows. So, when Aunty started to teach students, she intended for them to perform in public. Performance was referred to as hō'ike, a way for her students to show their knowledge of hula and share aloha. P1 told of her earliest memory of dancing in public, debuting at age four. She recalled vividly how the audience reacted and how she felt.

> You know, people loved the dancing and so at my age at four years old, people were throwing money on the stage. And I didn't know what was happening, and you're focused and you're dancing, and you're just into your zone. Right after you're pau [done], everybody's clapping and cheering for you. So as a little kid, I guess I got scared, starting to cry because they kept throwing money on the stage. But that's back then in my time when kids were shy and kids were quiet, and kids were not allowed to speak. During our time. ... Kids to be seen, not heard. And so, to have this kind of attention was like, earth shattering for me, you know? And so, I think just that one experience that I remember helped me to understand who I was. Maybe I did have a talent for dancing.

At the age of 11, P1 remembered doing "so many shows" with Aunty. P1 and another student frequently were the only dancers in these one-hour performances. P1 went on to described how Aunty directed a typical show.

> She would go do shows without a program. Without a program! She'd be on stage because we would run from one place to the other. She'd be on stage, and she'd be announcing the song. And she'd be talking, you know, introducing the song, and we'd have to be listening. And we'd have to change. And so, my hula sister and I, started dancing together professionally when we were 11, I think. So, by the time we were teenagers, we knew her style, right? So, we got smarter at it. You got to be smart, right? How are you going to get on that stage? So, we'd say, Okay--you go first. So, I would, I would help her get her stuff, her clothes on tie her ti leaf skirt off, her leis on and let her go on stage. And then I would ask somebody to help me change. And then we did this rotation thing. I would come on stage. My hula sister would go offstage. And we do this, you know, on and off. And we had to figure it out ourselves. Nobody taught us how to do it. We got really, really good at it, you know.

As a result of learning Aunty's improvised approach to hula shows, P1 and her hula sister became adept at listening for Aunty to announce the following dance number and developed a strategy to deliver a seamless performance. Because Aunty didn't have a predetermined program, students had to be prepared to dance any song in Aunty's repertoire. P1 added that often Aunty had taught them dances only once, and then they were expected to perform it, with the appropriate costume. and other Polynesian dances.

But from this experience, the students learned resilience, flexibility, confidence and showed their ability to dance any hula that Aunty announced. P1 added that "you worked your butt off, but we always had fun." This experience also helped P1 to remember the dances. "The songs that I learned as a teenager I still know today."

As part of a live performance, P1 learned how to dance with different accompanying musicians. Since musicians played songs differently, P1 invented a dance performance strategy because Aunty had told her students to "keep going" no matter what.

> As a performer, when you are on the stage, you are not allowed that liberty of stopping and starting over again. ... I can remember, as kids, when we were dancing, and you heard the musicians throwing in an extra beat, or they dropped a beat. And so, the timing isn't quite correct. And so, we could do one song with different musicians. ... In the classroom, if you have recorded music, you can study it, and you can dance to the recording. But when you're on the stage, and you have live musicians, you don't have that choice. You have to learn to listen. And you have to learn to adapt. So, the first time, if you miss that extra beat, and you notice an extra beat, the next time you do that verse, you got to pick up that extra beat. And then you're going to work it in through your choreography. You're learning on the stage as you're dancing. I always said to myself that Aunty taught us how to think on our feet. You think while you're doing, and you keep performing. You keep working at it. ... And if you only have three verses, and it's done six times, twice each, you got five times to figure it out. And better get it

right. By the time you end the song, you know, you don't have much time. So, in

that respect, it teaches you how to adapt to life, adapt quickly.

P2 and P3 both noted how AJ encouraged students to "keep going" during a

performance. In a recorded video of a one-day workshop, Aunty had students perform for

each other a dance that she taught. When students stopped, Aunty said, "keep going,

show business, keep going." After viewing this segment, P3 remarked that this was an

often-heard phrase.

> That's very familiar too -- show business. It never felt so true. We don't just stop
>
> when we dance. Just because we made a mistake. we're expected to just keep
>
> moving. Especially when we're on the stage. I can't even begin to tell you how
>
> many times something has gone wrong, where the musicians have just like
>
> completely done a whole nother [*sic*] verse, or like missed the whole part, or
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> something happened, or we're just drenched in rain. Like the craziest things
>
> happen. And we just have to learn how to adjust and just keep going. I love that
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> she said that's showbiz because that's really what it is, like we have, every time we
>
> dance, we're told to pretend like we're dancing on stage. That's the number one
>
> thing is like, performing it, like you're dancing in front of an audience.

P2 reacted similarly as P3, saying "that's totally something that is in line with how

she taught and what she really believes about performing. And whenever she says show

business, it was her livelihood. But it's also the learning that's involved in all that." P2

further elaborated on what learning took place and passed to her.

That's one thing that's she's really passed down to us too. It's not only practice, it's a part of the learning, being onstage or dancing for people. You kind of have to learn those kinds of lessons. Like even if you're not quite sure, just keep going and just try to pick it up. You just have to try to think as fast as you can. You have to try to grab the audience. Even if you make a mistake, as long as you're making your expressions and you're connecting with the audience, it won't matter so much to the audience, because you already have that kind of connection. And that's the kind of things you learn while dancing for other people. So, that that's totally Aunty and P1, what they both passed down to me too. And even if it's not perfect, it's no problem at all. 'A'ole pilikia [no problem]. You just you just keep going and you do the best you can. And the audience will love you for it, you know? ... That's the important part of the learning.

Watching this video of Aunty affirmed for P1, P3, and P2 that dance performance is a process of learning. P1 added her perspective.

It's not perfection. ... It's what you bring to the stage. This is what hula is. Your heart, how you feel about hula how you can, you can use hula as a platform to express who you are, as, you know, as a dancer. So, I always said that, and I guess is from my training from Aunty. ... I'm interested in what you can bring to the stage, and how you can communicate with the audience about the story you're about to tell, how deeply you feel about that story, how much you want to give. Because that's what it really is. Your ability to give yourself as a dancer, and a storyteller, in your movements, your body. And it takes a lot a lot of strength and

a lot of power to allow yourself to be vulnerable on the stage. And to give all of yourself to the audience.

P1 added that the dancer must strive for "the highest emotional level that you can reach so that people can understand your story." She described this aspect as a spiritual experience "that can allow your spirit [to] release yourself and to really become that dancer. ... Become that story." For example, she told a story of one master dancer, Iolani Luahine, who performed when P1 was a child.

I saw her once in my life. Aunty took me to a show that she was going to dance in. Oh, I must have been about what, 10, 11. I couldn't believe the power this woman had in creating this setting. I just could -- I could feel it. I could see, that's to me, what a dancer is. You can feel them, you could see them become whatever they're dancing about. And she was doing a dance about the wind, and we're out at the Ala Moana Park. And so, we're out in the open. My gosh, she became the wind. I couldn't even see her. All I saw was the wind. And that's how powerful, you know? And I'm not saying that our all of our dances have to be that at that level, because we never will reach that level. But just that understanding and that desire that we have inside of us to be that type of dancer that can communicate and that can transfer your feelings easily.

P1 and her instructors, P2 and P3, believe that performance on stage is an important learning activity. It is hō'ike, a demonstration showing what knowledge students have learned.

Competition as Learning. For many years, the hālau (school) focused attention on doing performances. However, when competitive hula events became popular, Aunty eventually decided that her students would participate. P1 told how competition hula became part of the hālau (school).

> When we first started taking the kids to Keiki Hula [Children's Hula Festival] we were just hō'ike. We never danced competition. We always danced for hō'ike [performance]. We'd take the kids and showcase them. Whoever wants to come, no matter what level you're at.

P2 remembered how, as a student, Aunty maintained her approach to competition as a learning experience. As with performance as a learning process, competitive dancing aimed to share their hula with the audience.

> The way I was taught, and the way we still teach, is you never go to win. That's not the point of being in a competition for us. At first, you know, when you're young, with Aunty, it was a way for hālau [school] to come together and hō'ike [performance]. For us, to share what we learned and to appreciate what other hālau [school]--appreciate their teachings. That's kind of what I gathered from it when I was a young child. But it was just a way for us to focus our energy and to focus our endeavors toward a goal. But the goal was never to win. It was to do our best and then to share what we know.

Over time, Aunty increased the hālau's (school) participation in other competitions and urged P1 to join her at these festivals. P1 had started her hālau (school) but still worked actively with Aunty. P1 said that the hālau continued this practice of

"whoever wants to go, because we don't want anybody to be to be left out. And so that's how Aunty always did it. Even up till she died.". However, as P1 gained experience preparing the students for competitive hula events, she began to rethink the instructional approach.

> I tried to figure out: Hey, how can I do this right? Maybe I should make it three classes. You go from the baby class to the seven-year-old class and then you get into the 10-year-old class. And then if you know your kaholo is good enough and well enough, then you can go to Keiki Hula and you know, and train for Keiki Hula. So, but that works if you have plenty of kids.

> Also, it was a learning experience for the teachers. When Aunty's hālau (school) increased their participation in competitive hula events, P1 observed that the competing hālau (school) began to embellish their choreography.

> As time changes, right, things get really fancy and they [the competitors] start spinning and dipping. And you know, they have all those different movements that they add from modern dance. And I saw that changing and coming. I've pretty much kind of stayed with the old traditional style. I feel comfortable with that. I feel comfortable with motions, traditional motions that I learned as a child.

> P1 considered establishing remedial levels of hula training so the students would meet specific competency levels as a prerequisite to being involved in competitive hula. Achieving these levels then served as a form of summative assessment of their learning. However, the competitive events imposed certain constraints. One problem was the number of participants required to dance.

If you have a small hālau [school], you have to take everybody anyway to make the numbers. See, so that's the part too, when you have competition or you have rules like that, it puts you in an awkward situation. And you have to make a decision. Okay, what are you going to do if you don't have enough children to -- you have just about enough kids to take. But then one isn't real good with their kaholo [dance step]. So, you have to take it upon yourself if you want to take them. And you probably will have to because of the numbers, you have to spend more time with that one child so that that one child can at least, you know, keep up with the rest of the kids. There are so many challenges when you're a small hālau [school].

The decision to take part in competitive hula events had an impact on how P1 organized her classes. Also, to follow the rules of the competitive event, she had to work with students who were not able to do specific movements well. She realized that to teach students to dance together she had to "go very structured" in her approach.

If you want to take your kids to like Keiki Hula and want to take your kids to Merrie Monarch, you got to jump on that competition bandwagon. And you have to find your own way of how you're going to deal with competition. If you don't want them to be so structured, how are you going to get them to that point of dancing together without the structure? You know, it's going to take you 20 years instead of five years. I'm saying you have to give up a lot. You have to sacrifice a lot if you want to go that route, if you want to go, competition wise.

P2 observed how P1 "had to develop a different system" after Aunty passed away, and P1 gained more dancers from Aunty's hālau (school). "She added another class to get ready for the Keiki Hula class. Give them like one year to firm up their basics. And then that's the class she pulls to go to the Keiki Hula." She added that P1 continued teaching hula for competition because of the benefits for the students who were willing to commit to frequent and lengthy practices.

> I feel like that helps them gel as a group. You can see the difference between how they dance together from the beginning to the end of that period. How they're much more conscious of each other. And I think it teaches them commitment, cuz [*sic*] it's a big commitment [that] teaches them really hard work. During the regular classes, they work hard. We always we teach them the same basic ideas, ''ai ha'a [bend deeply], expression. But it's once a week, compared to like five or six hours a week. You know, you can just see the progression faster with the Keiki Hula group, because they have all that time. I think that's one reason, if families can, that Aunty likes kids to go because it's not only how they represent the hālau [school], it's how they develop. ... Because they use that process to develop themselves as dancers, and as people. ... That's probably the main reason we do competition, is to help the kids develop in that.

According to P2, Aunty talked to the students before their competitive events. As a teenager, P2 was dancing in P1's hālau (school) at that time. She recounted with emotion one particular occasion when Aunty came to watch a dress rehearsal.

We were so nervous. ... Even those of us who've been dancing for so many years and been in so many performances that we were really nervous to dance in front of Aunty. Because we knew how much it meant to her and to us as a hālau [school]. I'm sorry [wipes a tear]. We got out there and we used the whole floor, the whole cafeteria, to do our routine and everything. And then when we were finished, Aunty sat down with us, and then told us it's beautiful. And oh, we were all crying, we're tearing up. ... But the most important thing for all of our hard work and dedication that we put in, it was all to show that aloha. That just meant so much to us that she took her time out to be there for us. That we wanted to dance for her too and for P1. For all of that dedication, it all just kind of culminated in that next day. It was just such a such a wonderful feeling, to all be together and share that together.

P3 commented that "it's a totally different mindset between competition and just regular dancing. She believed that her experience as a dancer in competitions improved her dance performance.

It definitely helped me improve myself as a dancer. I'm not sure if I would be able to be anywhere close to where I am at my level of dancing if I didn't do competitions. Competitions is what really helped fine tune my dancing and made me realize like what kind of dancer I was.

She observed that participating in competitions was a benefit to students from her experience. "I think competition really teaches discipline." Also, she developed teamwork skills.

Learning how to be a team was a big one for me. Learning how to work with many different personalities. I think personally, for me, it was mostly discipline and learning, how to stay focused on the goal and not falter, because you really had to come into everything. It took a lot of sacrifice and dedication to do competitions.

Aunty and her successors used hula competition events to teach students how to perform for hula festival audiences. She used the opportunity to transmit cultural knowledge through her teachings and observance of other hālau (schools). Participation in competitive hula events was a way for students to share what they had learned, share their aloha, and appreciate the traditions of other hālau (schools). Also, these events helped to bring the students and teachers closer together.

Dance Instruction. Except for video recordings of two conference workshops, little information existed on how Aunty taught, particularly in a routine hālau (school) setting. However, the interview participants, as students of Aunty, described a typical class. P2, as a young student, detailed the start of a regular class.

She had a routine. So as soon as we would get in there, we might talk story for a little bit but then it was duck walks. Duck walks around the room, I don't know, three times, or however many times it was. That's just what we did at the beginning of every class. You always had to warm up.

One instructional aspect that emerged from the interviews with P2 and P3 was that both instructors followed a prescribed protocol for a typical class. According to P2, the class format routinely has an opening and closing.

So, when we do classes, we usually start with E Ho Mai [invocation chant], the chant E Ho Mai to start. And I'm not sure if you'd call it protocol, but it's just something we've always done. We always start off with just basics, like a warm-up basics. That's unless there's something coming up that we really need to get ready for, like a competition that week or something. We might forego the basics, but usually that's very important for class. And then we end with ʻoli [chant] mahalo [gratitude chant].

P3 gave a similar response but included the process permitting latecomers to enter the hālau (school) space.

In class, we usually start with a prayer and one of the haumāna [students] would usually do that, and then we'll go into teaching. But we do have another one when we're in [class], or actually, there is another one that we do if you're running late to the class. And it's basically an ʻoli [chant] to ask for permission to enter from the kumu [teacher] and then the kumu [teacher] would give the response back to the chant.

Both P2 and P3 described a process that creates a sacred space for learning through an opening and closing chant or prayer. If a student was late to class and wished to enter, this person requested access through a specific chant. Although not mentioned by Aunty or P1, there was an implication that this cultural practice was transmitted through them.

Finally, the instructors shared class instruction responsibilities. P3 described the hālau (school) division of labor under the direction of P1.

P1 recognizes each of her alaka'i's [assistant instructors] strengths and puts them

in places where they know that they can do really well. For example, another

'alaka'i [assistant instructor] -- she is actually more with children because she's a

preschool teacher. So, she does really well with children. I'm very detail oriented

so [with] me around children it's going to be trying to teach them how to like

wave with the eyebrows. I mean, I can definitely be more relaxed, but I think she

[P1] realized that my strengths [are] far more with the older people that can

understand the details versus children that don't really comprehend details.

Although I do help teach the keiki [child] class and I substitute. We all substitute

for each other. ... But everybody has a unique teaching method, actually based on

their strengths.

When Aunty taught students a new dance, she did so in a specific sequence of

movements. P1 briefly described the instructional method that Aunty used as "you teach

them the hands, you teach them the feet, and you put it together." P3 made a similar

observation of the teaching sequence, described the process in detail.

If it's a new hula number, we first go over the story behind the number. So, if

there's some kind of chant or 'auana [modern hula] number that we're learning,

she'll explain who wrote it, the story behind it. And then we always start off with

the words. We'll go over the Hawaiian and the translation, because it's hard to

give emotions in a number if you don't know what you're talking about. It's super

important that we always go over what the story is and what the English

translation is in the Hawaiian words ... although we always try to memorize the

words when we dance. It's more important to her that we know what we're

dancing about. We always start off with that and then once we do that, we always

start off with our hands. ... We'll do hands for the first verse and then we'll do feet

for the first verse. And then once we do the feet, we add it both together. And then

we do the hands and feet for the first verse. And once she feels confident that we

know that then we move on to the second verse, and so forth. So that's how the

instructional teaching is -- it's the words, hands, feet, and then hands and feet.

P2, who taught young children, described the process for them:

So usually, for especially the younger kids, have them sit down and do the hands

first, like verse by verse. So, we'll sit down, and we'll go over the hands. And then

we'll do the feet, just the feet. And then when it seems like they're pretty confident

in their footwork, then we'll put it together. And then, after that point, you can

kind of vary the things that we can do to keep it interesting for them. Because it

does take a lot of repetition. That's just the way. It is a lot of repetition for the kids

to learn the song and to be confident in it.

To help students learn a dance, Aunty had one student who knew the dance well

enough to stand in front. P1 filled this responsibility when she was age 7 or 8. "I would

go with her on Saturdays, and I ended up being the kokua [helper] dancer in the front

row. And all the kids would dance behind me. So that was one of the most important

roles for me."

P2 commented that part of her teaching lineage from Aunty was the importance of

bending the knees deeply while dancing hula. This strenuous hula stance is traditionally

known as ʻai haʻa [bend deeply]. P2 said "we teach always ʻai haʻa [bend deeply]. The feeling comes when you bend connected with the earth." As practice for this position, P2 recalled the experience of practicing against a wall.

> We would straighten our back and, and bend, like bend really low. She would always say 'hit the floor.' But nobody likes being on the wall. I mean, it wasn't as a punishment. It was just, 'okay class, we're going to dance on the wall now.' We're all like, oh, great. But we did it. And then I do have to say it really did help with bending, I think. After we danced on the wall, after when we got off the wall and started dancing, we were low. You know, we were hitting the floor.

P1 explained that P2 and P3 did not create choreography at present, saying "when it's their time. Their time will come. You know, not quite ready yet." However, she added that they could begin within specific parameters.

> They could probably do some choreography, for kahiko [ancient hula], not too much. Maybe ʻauana [modern hula], yes. [Because] ʻauana [modern hula] more open. You can be more free. You have more freedom, more freedom to choreograph and use whatever motions move you. But in kahiko [ancient hula], that's a different story. It has to be more, what [do] we call it? Keep with the traditions, keep with the traditions.

By keeping with the traditions, the hālau [school] maintained its ancestral connection to the knowledge transmitted through hula. P3 confirmed that this practice continued for her as well. For traditional hula, or hula kahiko [ancient hula], the instructors taught in the same manner as their predecessors. This style was unique to their

hula tradition. After viewing a workshop video where Aunty taught a traditional hula, P3 explained:

> Certain numbers that you learn from a kumu [teacher], you can tell what kumu [teacher] their hula lineage is. Because like this song right here, I'm sure Aunty learned it from her teacher and her teacher learned from her teacher. And it's been the exact same the whole entire time, like this traditional song that you don't revise and make your own over time. You just keep it the exact same way. And that's how she was taught. And that's how P1 was taught. And that's how I was taught from P1. That's exactly the same motion.

However, for more modern dance styles such as 'auana (modern hula), the kumu (teacher) exercised more flexibility in creating dance movements. P1 pointed out how Aunty modified her choreography over time and how P1 has followed this example.

> But in our days, I mean she worked you, boy, all those different kinds of movements, turns and twists and 'ami's and hip sways and down and up and round and round. And it was always good fun. But as she got older, her motions became simpler for the babies. Or the younger students are the 'opio students because she stopped teaching 'opio. She started to just teach the keiki [child] and kupuna [elders]. She would send all the 'opio's to me. So that's how I ended up with P2 and P3, and also for students when they became 11, 12, 13, 14. ... And so, the songs that I learned as a as a teenager, they [P2 and P3] had a different version of it. And then when I taught them Aunty's original version, they're like, whoa, wow!

I said, this is not my version. This is not my choreography. Now, this is Aunty's choreography so you can see the difference.

Altering Approaches. This study included a sub-question asking if instructors would alter their approaches based on the knowledge of the stories shared by Aunty. In this case, participants viewed video recordings of two workshops taught by Aunty. In one workshop, Aunty taught a traditional dance, or hula kahiko. This dance, A ka luna o Pu'uonioni (hereafter referred to as A ka luna), told the story of the volcano goddess, Pele. The second workshop featured a modern hula 'auana, but the story told of an actual historical event about a woman named Pa'ahana who survived in the wilderness. Aunty similarly presented the instructional sequences, telling the story behind each hula before launching into instruction. Participants viewed the same segments throughout each workshop recording. All three participants stated that they had learned and danced A ka luna as students. P1 referred to this traditional dance as "foundational" because it transfers the cultural knowledge as part of the hula lineage of the hālau (school).

I only taught this chant to those that that that have stayed with me a long time. And then they're going to maybe, like P3 and P2. Those groups of dancers that are going to want to learn more and perhaps want to, to teach one day, you know, and ho'opa'a [chanter] become ho'opa'a [chanter] one day, or Kumu [teacher] one day, and to establish their own hālau [school]. These are the foundational chants that you need to learn.

P3 described this dance as a standard and remarked that "a lot of different hālau [schools] would know this number." However, she noted that "because it's such a traditional chant that most people don't switch up the motions too much." The motions taught by Aunty are unique to those of the hālau (school).

Because like this song right here, I'm sure Aunty learned it from her teacher and her teacher from her teacher. And it's been the same the whole entire time, like this traditional song that you don't revise and make your own over time, you just keep it the exact same way. And that's how she was taught. And that's how P1 was taught. And that's how I was taught from P1. That's exactly the same motion.

Based on the cultural significance of this dance, the dance movements have remained the same through generations of teachers. Although Aunty utilized several learning activities, such as small group breakouts, the participants did not identify any new instructional practices that they could or would alter.

For the second workshop, Aunty taught the dance Pa'ahana. This dance was not considered a traditional, foundational hula as A ka luna. Instead, this dance described a historical event. This hula was not learned by anyone other than P1; neither P2 nor P3 learned this particular dance. P2 stated that she knew of this dance because the kupuna (elders) class performed it. P3 had never seen this dance, so she viewed it for the first time at the interview.

Aunty utilized several instructional methods in the form of learning activities to keep the students interested. And unlike the use of live chanting in A ka luna, Aunty used recorded music for Pa'ahana. The participants viewed segments showing different

instructional methods used by Aunty throughout the workshop. After the students learned the basic movements, Aunty broke the class up into small groups. She provided the following instructions.

> We're gonna take half of the class and the other half are going to sit down, and they're going to entertain us. And we want you to choose, you have your helpers, but we want you to choose somebody in your group that's going to be your kumu [teacher]. That's gonna be fun. Then one of our dancers will be with the group.

P2 watched the segment and responded, saying that "We do a lot of that, where we break up into teams ... so when we learn a song, half of the group will sit down and watch. And another half will dance for us ... it's a very familiar thing." However, in another segment, Aunty tells the workshop students to get into "one big circle." After viewing this segment, P1 reacted by saying, "dancing in a circle is harder." When asked if she would use such activity, she said:

> Not the circle part. Because [with] the circle you have to reserve that for a special group, like kupuna [elders]. The kupuna [elders] still do that. In Aunty's kupuna [elders] class that I have now, we put them in circles, and they love it. They love looking at each other and dancing. That's part of the fun. But they don't realize how difficult it is to dance in a circle because Aunty just says, Okay, this is what you're going to do. And it's fine. That's how she presents herself. Whatever she does, it's going to be fine.

P2 viewed this segment and explained the challenges and the benefits of dancing hula in a circle. She reacted by saying "that actually takes a lot of focus, because the

people you're looking at [are] going the opposite way physically." Despite this challenge, P2 felt that this method "gives you a nice feeling to see everybody enjoying themselves together rather than just always the back of their head."

Weighing the advantages and disadvantages, P2 would consider using this practice in her teaching. She feels that it might work well for specific age groups. "I might use it. I don't know if I would use it for the keiki [child]. Maybe if I had older adults or people who are very experienced already." She later added that she would consider using this practice with her ʻopio [youth] level class. "I think they might enjoy it. They might get a kick out of it, but maybe after they know it well enough. They wouldn't get too flustered."

P3 viewed the segment and offered her interpretation of the use of circles for dancing hula. She explained that some hālau (school) "have mirrors that they can dance in front of" to ensure that the dancers were synchronized. Since their hālau (school) "never learned how to dance with mirrors", this method offered an alternative means to synchronize. "The circle gives everybody a better chance to see everybody and get used to how to dance together."

Considering these factors, P3 decided that she might use this "but not very often. This isn't a technique we use, every single class or every single time we learn a song." Then she reconsidered times when this activity would be appropriate. "I guess it depends on the motion and the movement. But doing a circle like this would make sense for certain motions and session movement. And my kumu [teacher] has had us do this to help synchronize us better together."

Later in her interview, P1 gained an insight as to why Aunty used the circle activity to teach hula. Viewing these video segments provided an opportunity for P1 to reflect on the significance of the circle in hālau (school) life.

Aunty always taught that [there is] no division in hula. All the kids sitting [there], and they're clannish in their groups. [If] everybody's in one circle, you sit in one circle, you don't have your little cliques here and there. Everybody sits in a circle, and everybody eats or snacks or talks in a circle. So that's where the circle thinking came up. ... You gotta come together. So, it represents unification. It represents lokahi. No, I'm just making this up in my head because, because I'm recognizing why she's doing it. Although she never told me. ... See my Aunty, she's right on. She knows how to, to deal with these kinds of issues. She doesn't do it the Western way, you know.

As the leader of the hālau (school), P1 has sustained the foundational teaching approaches of Aunty, including the transmittal of cultural knowledge embedded in traditional hula. P2 and P3 based their instructional methods on the example established by P1. These approaches included student-centered methods, teaching as preparation for performances and competition, and a class structure that consisted of a cultural protocol and instructional format. Although the hālau (school) strictly kept the integrity of the traditional dances such as hula kahiko (ancient hula), P1 created different choreography for the modern dances, hula ʻauana. For traditional dances such as hula kahiko (ancient hula), the focus was on the exact transfer of cultural knowledge, so few innovative practices existed. However, for more modern dance forms such as hula ʻauana, there was

more flexibility to include instructional practice to enhance learning. Except for the circle dancing method, there were no instructional practices considered for alteration. This condition supplied evidence that the hālau (school) used all its resources to the fullest and continually sought ways to improve instruction. That was Aunty's legacy. This practice was an example of innovation as described in the 'ae kai conceptual framework.

Life Lessons Beyond the Hālau (School)

One theme that emerged from the data was that teaching and learning hula gave participants skills and abilities that transcended hālau (school) life. Once again, Aunty established a precedent as an individual who devoted herself to hula while balancing a family and a full-time career. According to P1, Aunty began working at an early age.

> She was orphaned for a few years. She was a high school dropout. She went to work for the Navy at 15 years old during the war, and she worked at 15. Then she danced at night, for Lena Guerrero and Lena Machado. And she helped. She paid her brother, her younger brother's tuition to Kamehameha School. She paid for his education while she went to work and never got an education. And later on, she got a GED.

Aunty supported her brother's education and later earned her high school diploma. This action reflected Aunty's belief that formal education was important. P1 remembered Aunty as a highly involved person, in and out of hula activities. "She was a workhorse. She loved working. She loved all of it. And it was no problem to her, plus doing all her shows, teaching all her kids, all her classes. I don't know [how] she did it

and raise her family." P1 described how Aunty did not let her lack of a formal education limit her career aspirations.

> She became the Affirmative Action officer with just a GED. And then she became the commander's right hand in dealing with these Affirmative Action cases. And she got so good at it. He would never do anything without consulting with her. And she was very, very low profile. She'd go to work in mu'umu'u ... she worked at the Navy with her mu'umu'u every day. And that commander just fell in love with her and just she had him eating out of her hands at anything she would say. She was nice about how she would say it. Say things and how she would support the workers. ... She really developed that art of speaking with people, and she wouldn't raise a voice. She wouldn't even have an aggressive look. She would look like an old tutu, old grandma. And when she talks to you her words would come out of her mouth, like chocolate, like silk, and you just fall in love with her. And she was like that her whole life and that's how she taught.

Aunty was humble, compassionate, and used strong communication skills in her professional career and as a hula teacher. She treated her co-workers in the same caring manner as her students. Her interest in the lives of her dancers was so extensive that she was involved in launching their careers. P1 gave an example of her experience.

> And I can remember when she was a young kumu [teacher]. She would help you find a job. You saw all her dancers, her regular dancers. Every single one of them, she helped them find jobs. ... Just like me. I went to Hawaiian Airlines. I became the manager there and that was my career. And then I went to work for the State

of Hawaii. And that was another career as a protocol officer. ... If you were with her, she always helped you. And so many of her students, the job that they have today were the jobs that she helped them get when they were in their 20s. ... She enjoyed doing all that. She never told anybody. She never said who she went to get jobs for them. She just made friends with everybody, and everybody just melted in her hands. And she called herself Aunty, right? And she would really be so nice. 'This is Aunty and I'm looking [to see] if you have any positions or whatever.'

This type of networking may seem out of the ordinary from a Western viewpoint. However, from an 'ae kai conceptual framework, hālau (school) life and everyday life are deeply connected. Based on this idea, Aunty was taking care of her students by seeking career opportunities for them. Using her relationships in her community, she gathered information on potential jobs available. Somehow, students became aware of these opportunities. Aunty was incognito, ensuring that they took their initiative to pursue these jobs without knowing she was involved. This behavior is consistent with P1's comment that Aunty was "humility and hard work."

Although hula and instruction were the focus of this study, participants spoke about their work outside of the hālau (school). This emergent pattern reflected how the instructors viewed their lives in an integrated, holistic manner, with hula and outside life as the same. Teaching was not an act necessarily limited to the hālau (school). When P1 talked about cultural values and hālau (school) norms, she spoke of teaching hula and

working as a manager interchangeably. She believed that she gained her nonverbal

communication skills from being with Aunty.

> I was really good at nonverbal communication. When I worked at Hawaiian
>
> Airlines, I was a manager of 200 people. And I didn't have to say anything. I
>
> could tell when I walked into the room, or if I ran into a person who was going to
>
> ask me a question or if they were in trouble, I kind of knew they were. ... Now,
>
> this nonverbal communication term came out after I learned about hula and how
>
> to use nonverbal communication. Because in the hula classes, you don't say one
>
> word, but you better know what your kumu [teacher] is thinking, and you better
>
> know what she's gonna do before she even does it. And same in return. So, there's
>
> this wheel that turns between you and your kumu [teacher]. ... She's gonna come
>
> to say to you before you even say it, and so I use that in running my office. I use
>
> that kind of interaction and caring about your employees that are learned in hula.
>
> It's all about caring about your students. And caring about people that you interact
>
> with. ... It should be a natural thing. ... They call it, you know, the spirit of aloha.

Furthermore, P1 credits her people skills from her experience growing up in the

hālau (school) with Aunty. This aptitude helped her to advance her career.

> She was akamai [smart], real akamai about people relations. And so, I always try
>
> to model myself and use her as a role model and so on. And so rather than getting
>
> upset with people, you have to put yourself in their place first, you know? And
>
> then take it from there. So, you see both sides. So, I got really good at that too. So
>
> much so that they offered me a promotion. ... I never went to college. I had no

college. ... [But] I never said no. ... Don't think about you because you know who you are. But you need to understand people. Understand where they're coming from, understand what motivates them. ... All of that--public relations, people relations, in being part of Aunty's hālau [school]. She taught me how to be all of those things. And how to be empathetic and with people and take care of them. And I couldn't figure it out until after I became like 67 years old, 70 years old. Then I realized that I needed to help. I needed to help people because, and then let people come to you, because you know who you are, and you have your strengths.

As part of her skill in nonverbal communication, P1 disclosed that she paid close attention to spiritual signs or ho'ailona for guidance in teaching hula and managing the workplace. In reading these signs, she developed a practice of observation and reflection needed to solve problems.

I'm a hō'ailona [spiritual signs] person. Hawaiian way, you have to be able to see the signs. And you have to be able to know what the signs are saying to you. Whenever I read for hō'ailona's [spiritual signs], I move, because that's telling me, the sign is telling me that I need to move in that direction. Not because I have to. But because there's something in me that saying, oh, this way. And so that's how you learn about yourself. You got to be able to read what's inside you. What are you feeling? What do you have to do? How do you respond to it? When I was working in Hawaiian Airlines having 200 people under me, everybody in the office always reacted when something bad went wrong, or even something good went wrong. They always reacted, they jumped. And I thought to myself, in hula,

you don't react that way. You watch, you learn. And when something happens,

you respond to it. You bring it into your space, and then you feel what's going on

and then you respond to it in a positive way. When you react more aggressively,

you're more negative. Respond to it. So, when things came up in my office, I

never panicked. Although I used to panic when I first started, but I never panicked

because I always said that. And I just let it soak into me, into my mind, and into

my heart and then [decide]: How am I gonna respond?

P2 reflected on her career decision and how it was influenced by being in the

hālau [school]. She recalled how Aunty and P1 reinforced this idea of using abilities

gained in hula and applied them to another profession. P2 became a preschool teacher.

So, as I grew up and thought about different careers, I think it was always very

people oriented. And helping people to develop that kind of idea in some way or

another. So, I feel like when I work with the kids in preschool, there's things that

we want them all to learn. But I feel like I also tried to really look at their

individual strengths, as most, pretty much all teachers do look at their individual

strengths. And look at each child individually. I think I really learned a lot of that

from hula.

As with her hālau (school) responsibilities, P2 did not focus on a higher

leadership role. "I'm not really interested in becoming a director or -- I kind of like where

I am now. I like working in the classroom. I like working with the kids." For P2, teaching

was her calling. However, she believed that hula influenced her entire life. "I feel like

I've learned through hula that [hula] has benefited everything else that I do in life. So many, so many things."

P2 took a broad view that what she learned in hula integrated with her life. P1 has taught her the importance of life balance in particular. "She understands that everybody has different things outside of hula. That we have obligations too." These outside concerns included personal interests and beliefs. P2 saw a connection between the cultural values she learned in hula and her Buddhist spiritual beliefs. She explained how the E Ho Mai chant used in hula class has a deeper meaning for her.

> I feel like they're encouraging their haumāna [students] to look past, what's right in front of them and to open themselves up to ask for help. And that's one of the reasons we do E Ho Mai is because we don't do things all by ourselves. We get lots of help from, the world around us, from teachers around us, from each other. It's never an individual, only an individual endeavor in whatever we do. Being Buddhist, it's kind of the same idea. It's never you by yourself. It's your ancestors. And I think even in Hawaiian culture it's your ancestors that helped you through your journey. So, I think that's one way I really connect spiritually to hula. ... I believe everybody who came before you paved the way to who you are. And you can pave the way in other people's lives as well as you go through your journey. And that is that line of that continuum that helps make us stronger. And can help guide us along the way. I really feel like that's really reinforced and everything Aunty and P1 taught us even though I'm not Christian. And then that's also a way

we can come together. By all of us realizing that we can all open ourselves up [with] that vulnerability [to] make us closer.

In contrast, the most valuable skill P3 has embraced from hula was leadership. "I think P1 has taught me how to be a leader. First of all, but even more specifically, is how to be patient when it comes to hula dancing." P3 remarked:

Hula really did help me start off in a leadership kind of position. Because I was an 'alaka'i [assistant instructor], having to manage a bunch of different personalities, a lot of different personalities. And then trying to be like a people person and try to bring everybody together. It really did help me determine that I really wanted to go into some kind of leadership role in my career. And that's where I am right now as a leadership role. So that was probably the first leadership role I was ever given was helping my kumu [teacher] with teaching others.

By developing her leadership skills inside the hālau (school), P3 realized that she wanted a leadership role in her professional career. "Career wise, I'm actually in marketing. So, my passion is in marketing. And I'm an all-around marketer." P3 enjoyed her career and intended to continue working in that field. "And I actually foresee myself staying in marketing, moving forward. I really enjoy being creative and not having to do the same task over and over and over again. So, it's fun to me." She believed that her cultural background gained from hula helped her in her job.

But the good thing about doing marketing in Hawaii is that you do have Hawaii instilled in a lot of our marketing pieces, like from Hawaiian words, spirit of aloha kind of thing. So, it still has some kind of tie into my position and what I do.

Because obviously, marketing here in Hawaii is a lot different than marketing in the mainland. You can tell a mainland commercial versus a local commercial. So that it really does help having some kind of background and being taught all these different cultural backgrounds during hula and being able to instill it in my work.

Aunty was an example of a hula teacher who successfully balanced her hula teaching career with other aspects of her life. Using her interpersonal communications skills, she helped her dancers as well as employees in the workplace. This holistic approach reflected the values that she taught in hula applied to life beyond the hālau (school). These values were Hawaiian cultural values and values that Aunty promoted in the hālau's (school's) internal culture. P1, P2, and P3 acknowledged that the life lessons they have learned in the hālau (school) influenced their career choices and life choices.

Teaching Challenges Promote Innovation

Over many decades of teaching, Aunty encountered her share of obstacles. These obstacles fell into two categories: external and internal. It was from these influences that Aunty adjusted her teaching and instructional approaches. Such adjustments are innovative because they were novel and practical.

External. The external obstacles were those events and conditions Aunty confronted as society changed in Hawaii. This environment may have influenced the commitment of Aunty to sustain the Hawaiian culture through teaching hula. For example, when tourism increased post World War II, Aunty used public performances as a vehicle to educate audiences who were not knowledgeable of hula or Hawaiian culture. In this endeavor, she engaged her students, such as P1, to tell cultural stories through

dance. Later, Aunty adapted her shows to include dances from other Polynesian cultures, such as Samoa and Tahiti. P1 explained this situation arose "as the times changed and the tourists wanted to see certain things. That's how Aunty started to move into including the different Polynesian dances." However, P1 added that the culture continued to evolve.

When we go into the 70s it changes. Because the Hawaiian [sovereignty] movement is starting. And it's all about getting back to our Hawaiian roots. And so, we start peeling off all the other Polynesian songs and Polynesian dances. And we go back to our roots only hula kahiko [ancient hula] and hula ʻauana [modern hula]. So, depending on the times and the demands was how the hula, the hula studios and the hālau [school]s formatted their classes.

This movement marked the beginning of the Hawaiian Cultural Renaissance. As part of this movement, the Hawaiian language revived, and hula competitions became popular. Aunty later involved her students in competitive events. However, according to P1, Aunty did not speak Hawaiian. Like many in her generation, no one taught her Hawaiian. To get a translation of a song, she would contact the composer or find someone to translate. P1 recalled "I remember her struggling a lot, you know, when she wanted to teach us songs when she didn't have the words, and she'd have to call around and she'd ask, and she'd be writing on pieces of papers."

Through her efforts, Aunty accumulated extensive cultural knowledge of hula over her lifetime. However, she was also aware of the practicalities of what knowledge should be transmitted. In a recorded oral history interview, Aunty spoke about her

dilemma of what knowledge to pass on regarding some of the ancient hulas she had learned. When the archive interviewer asked her about teaching these dances, Aunty said:

> Never felt comfortable teaching it. Never felt it was time. I know when the time is going to be when I have a group of ladies or dancers that can do it. But you see, it has to be dancers that wanting to learn this type of dance. Because otherwise, they'll never learn it. You go over and over, and they'll never remember because there's no connection. You have to connect with it.

It seemed logical to ask P1 if these ancient dances passed on to her. After viewing this segment, P1 responded:

> I have that same feeling that if the students aren't ready for a particular number, you never teach them that chant. Hula [contemporary] is a different story, but in hula kahiko [ancient hula], the students have to be ready mentally, spiritually, to learn the chants that you want them to learn. I have to say that, over time, as time goes by, you have to make choices whether to teach them, even if they haven't reached that level that you feel before you pass on chants. Or shall you let it die? For you have to operate in both worlds. Is it better to let all of this knowledge die? Or is it okay to pass on some, not all, maybe some of the chants that we've learned?

In the era that Aunty taught, Western-dominated societal pressures continued to influence Hawaiian culture and hula. P1 spoke of the historical struggles and how Hawaiian identity became stronger due to the passage of teachings from previous generations.

The outside influences have changed who we are as a culture. ... We were told that we were a primitive culture. We're not akamai [smart]. Come to find out, we're brilliant. We have our own achievements as a society, achievements that nobody else in the world ever accomplished, like surfing. Simple, surfing! Whoever thought of making surfing, catching a wave and riding it, riding mountains of water in the ocean, and then end up on the sand. ... We were not allowed to know about who we were. Today, different story. We know who we are. We know that we have the capacity. We're capable. You have to have that kind of knowledge. And to teach, and to develop ourselves into a society with the stratification that we had. It's unbelievable, the kind of stratification that we had. I said, Oh my gosh, why didn't they teach us that? But our parents did it. And our grandparents did it because they wanted us to be successful in a Western world. Because the Western world was going to take over. But not knowing that you got to be kanaka maoli [Native Hawaiian] before you could be anything else. You got to know who you are first, before you can be something else.

Based on this viewpoint, it was evident that innovation was an inherent component of cultural survival and identity. However, challenges existed in the present. As a teacher in a rapidly changing world, P1 still confronted issues of how to teach hula in a way that was relevant and meaningful.

As a kumu [teacher], you have to make choices, which way you're going. You're going where everybody else is going, or you're going to stay over here, or you're going down the middle of the road? What path are you going to take? It's always a

constant struggle, especially when we lose masters like Aunty and the old masters, you know. Hard to hold your own line. Today, we have no excuse, no excuse [not] to teach our students the mo'olelo [story] behind it.

Internal. The internal challenges, according to the archival records of Aunty, were those from her students. P1 has continued to embrace this belief. When P1 had her hālau (school), she saw that Aunty changed her instruction.

I noticed that she was starting to use different methods, you know. She was very creative. Aunty found all kinds of ways to teach. And in fact, the kupuna [elder] class, because she had them for so long. And this is what we mean about teaching a class, certain songs when they're ready for it. When you're together that long, you have the flexibility of teaching them songs that that you've had, for years and years and years, and you can, you can actually pass it on to them.

P1 then explained the instructional innovations Aunty used with this older group of dancers. She described how Aunty developed complex dance formations for them.

I was able to attend one of her classes. And I'm not sure if it was Pa'ahana [the dance]. But it was a song that had lots of verses in it. I couldn't believe the intricacies of her routines. She had them in eight rows. And doing all of these movements, not only just switch rows, she had them going in diagonal forms. And she had them going in circles to the right and to the left. And these are kupuna [elders]! And I thought my gosh, she's making them really work hard, because you have to remember your position in each of those different routines that she

came up with. But you know, Aunty was a real, real creative in that in that way. She would come up with these wonderful ideas.

Since hula is typically danced in uniform rows, this innovative approach challenged older, more experienced dancers. P2 detailed how Aunty revised her teaching method with them.

Over the years she's tried to challenge herself, to take on new classes and new ways of doing things. And I know, even with the kupuna [elders], I've seen [that] she gives them a lot of-- I mean, she gets the final say and everything. But I think they're very beautiful, graceful, very intelligent women, and she takes their input into consideration. I think [if] they have a suggestion, she'll at least listen to it and consider it very seriously. And I have seen a lot of things that she's allowed them to do that maybe she never did before, like doing the notations and things like that.

Based on the perspectives of P1 and P2, Aunty continually sought innovative ways to teach hula throughout her career. Her efforts established a culture of innovation in the hālau (school). P2 reiterated how P1 worked to improve teaching. According to P2, P1 made instructional changes because "everything she does there's a reason for it, and she's always adjusting. How can I do this better? I think that's so amazing that she can do that." P2 mentioned that P1 invited her feedback on instruction. "Because I've taught more closely with P1, sometimes she talks me through some of the changes and why she wants to try this and try that." P2 agreed with and followed how P1 had balanced traditional movements with innovative ones.

And sometimes P1, she choreographs something, and then she watches the girls

dance and then she might change it. Because it doesn't suit the girls or she feels

like, they're maybe not comfortable. So, she might change that way. So, I think

being creative is good. Trying different things is good. But in my belief, you

should still try to stay within the framework.

COVID-19 Impacts. One significant event that dominated the interview

conversations was the impact of the COVID-19 pandemic. At the time of this study, the

COVID-19 pandemic was prevalent in the lives of all involved. This situation had a

profound effect on how the instructors taught hula. P1 told a story of how she had to

adjust the class instruction pending a statewide shutdown. At the time, students were

preparing dance at an upcoming hula festival. The festival, which was usually live, was to

be televised instead.

When I first started teaching them, it was before the ban. The ban [limit] was 10

[people], you could have 10. So, I knew that I had to hurry up. In two classes, or

three classes, I taught them all the verses. And then on Zoom, as the ban started

really tightening down.

Although P1 had taught the students the dance in an accelerated manner, students

still needed to learn an 'oli, or chant, as part of the performance. She resorted to the use

of Zoom technology to fill this need during the shutdown.

And then I had to teach them to 'oli [chant] on Zoom! They know how to 'oli

[chant] but you have to be able to bring the voices together. So, most of the time

that I spent on Zoom, like if we had a two-hour class, an hour and a half went to

just 'oli [chant]. Individually, together. Try and put that together! Hard, you

know, was really hard. So, [that's] what I did ... it's just a short piece about

Poliahu but trying to adapt to working on Zoom and trying to bring it together

was pretty difficult.

To make sure each student learned the chant, P1 devised an instructional method

using remote technology. She developed this solution based on suggestions from the

students she teaches at a local community college.

I ended up having the girls do a voice recording of themselves. And every week,

they would send me a voice recording. And it turned out to be a pretty good

method. And I would listen to it. And then I would comment, where they had to

work on weak spots. And over four classes, so that would make it like, two and a

half weeks or so? Four weeks? Yes, four weeks, four recordings. And I could play

the old recording compared to the new recording. And then find where they

improved and areas where they needed to work on. And it turned out to be the

best thing. So, we listened to all nine of them [students] individually. And then I

had the person who was going to lead only record her voice and set it up for the

rest of them. And then that last week, before we danced, they studied, or they

recorded their voice with the lead only person in the background. And gosh, that

day when they when they chanted, they're like, wow, that was pretty good. You

know, considering we did it all on recording and Zoom.

P1 taught the students the entire dance in person. Then she devised a remote

method to teach them the chant. However, the dancers would perform as a group. P1

realized that they needed a group rehearsal. "I told them, if we have a lift in the ban, just before we go dance, then we'll get together. Because the girls said, P1, can we just get together at least once? Before we go and dance?" P1 explained how she accomplished this feat within the limitations of the shutdown rules, which at the time, limited gatherings to five people.

> I even had one time when I knew when the ban allowed five. I had the first row come to class, coming through the front door of my house leaving through the front door, and the second row coming through the garage and leaving through the garage. But that was just one class. And then it got tighter and tighter and so we didn't have any classes. And then we got together one time, Friday night, before we went to dance. But you know, hula dancers are that way. You have to have the right dancers, the right group, and if you don't, that's okay. You just have to do the best you can.

> P1 added that these students had danced with her since they were children for "quite a number of years." For that reason, she felt that "it was easier for the group to come together quickly." Furthermore, the group enjoyed the challenge. "They enjoyed it and I enjoyed doing that project."

> ***Use of Technology.*** Before the COVID-19 limitations, the hālau (school) used technology to function in an organized manner. For example, since little is written down, the hālau (school) used videotaping to record dances. According to P3, this technology provided several benefits.

P1 is really open to us using video, like videotaping. That's an innovation in itself than like having to use paper. Because I think it's hard to convey expression. Like Aunty was all about emotions. So, it's hard to convey emotions on paper. Whereas you can do that in videos. So, videos were very much accepted. P1 was more innovative than Aunty over time, but P1 allowed us to take videos of things. Because I think that gave us a better idea of how to dance songs, versus like writing it down on a piece of paper. And only thing, like I mentioned, we had on paper, were the actual chants.

Videotaping helped dancers to not only learn the proper movements but also recorded how the dancers conveyed expression. This technology proved to be more beneficial than paper documents. Also, P3 mentioned that the hālau (school) used other applications to perform routine class functions.

We use a lot of Google Spreadsheets now between the alaka'i [assistant instructors]. ... Instead of a printed attendance, there's a digital attendance. Because usually if P1 is not there or another alaka'i [assistant instructor] isn't there and you don't have all the paperwork for attendance, it makes it a little difficult. But now we could just go on our phone and click the X. And just like, oh, this person's here, this person's here, regardless of who's teaching that class. They don't need a clipboard or whatnot.

For classes that involved preparation for competitions, P3 said, "I think a lot of kumu [teachers] are struggling with that and trying it because you know, it's all about when you do competition synchronization, and you can't really do that with Zoom." Since

a performance measure for competitive hula was group synchronization, using a live

webcam platform such as Zoom posed challenges.

> It's definitely an interesting process. We are doing it but at the same time it's a
>
> little hard because there's a delay in the Internet, when you're playing music. You
>
> can't just like do ipu heke [gourd percussion instrument] and chant, because the
>
> music is off from what they're hearing.
>
> P3 added that, "depending on their camera and their angle, it's hard to see where

their hands and their arms are." Instead, she said, "right now, we're just doing the base of

the songs and just going over the words and the translations and then starting them on

hands and feet, but not really doing detail oriented" like how I like to do it." As an

alternative, P3 described using an application that provided students feedback in

preparation for competition.

> When we start a competition because there's so much back and forth going on.
>
> And a lot of people ... miss practices. I introduced this one. It's a team app that
>
> everybody can use instead of doing a text message or an email, which is not as
>
> efficient. We all utilize an application to be in touch with each other in regard to
>
> notifications, new moves. So, every time somebody missed a class, we had
>
> somebody take responsibility for writing down all the changes that happened in
>
> the song at what verse. And then I made it a habit to always record our
>
> performance at the end of the practice. So, we would record the whole entire
>
> performance, then I'd post it up on the app. And then before the next class,
>
> everybody had to look at it and basically comment on what areas, from the after

watching the video, [that] they feel like we need to work on in our next practice.

And that was actually huge progress for us and in doing that.

P3 explained that this method allowed students to observe their performance as a group and make adjustments. "We definitely did a lot better when we were able to watch ourselves after every performance and then see." This method was also a helpful tool for the instructors to observe and give feedback. "And we have P1 that watches, maybe a couple 'alaka'i [assistant instructors], but they only have one pair of eyes and they only can see at once. Whereas when you watch a video, you can watch it over and over again." P3 feels that using video recording was a valuable tool for learning and refining performance.

Aunty confronted the challenges of a changing society that influenced what and how she taught hula. Hula played a critical role in ensuring the survival of the Hawaiian culture. Despite this burden to sustain the culture, Aunty never lost her focus on her students. By establishing a culture of innovative instruction in the hālau, or school, Aunty's influence was still present in the hālau. Despite continual challenges for the instructors to sustain traditional knowledge in a changing world, the COVID-19 pandemic has shifted the instructors' focus on using more technological tools to continue teaching hula. In keeping with the 'ae kai conceptual framework, teachers employed instructional adjustments on an ongoing basis to teach hula and engage students.

Summary

Chapter 4 explored answers to one research question divided into three sub-questions. Cultural knowledge transmission, instructional approaches, life lessons beyond

the hālau [school], and teaching challenges promote innovation provided evidence for the

central research question. In Chapter 5, I will describe my interpretation of these findings.

Chapter 5: Discussion, Conclusions, and Recommendations

Introduction

The purpose of this study was to gain an understanding of how hula instruction has evolved as a means to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. To fulfill this purpose, I examined the stories of learning and instructional practices of Indigenous Native Hawaiian teachers, past and present, from a traditional hula school. This understanding is essential because the predominant Western culture brought societal changes to Hawaii that did not consider Indigenous Native Hawaiian ways of knowing, being, and doing. With this study, I sought to reveal the historical hula learning and instructional practices that might be regarded as innovative in the current practices of the kumu hula. The results of the study revealed eight key findings, as follows:

- Cultural knowledge, values, and norms embed instruction that is relational.

- Instructional approaches align with Hawaiian values that focus on students.

- Current instruction sustains tradition balanced with innovation.

- Hula education teaches life lessons beyond the hālau, or school.

- Limited evidence of alteration of instructor practices based on the knowledge of the kumu hula's stories.

- A tradition of innovation exists in the hālau, or school.

- Instructional innovation is a kākou (or everybody) thing.

- Innovation is a spiritual matter because everything is connected.

Interpretation of the Findings

The central research question adopted in the study was: How have instructors, connected through a traditional hula school, approached instruction? To answer this question, three sub-questions were used.

- What are the key instructional practices represented in the stories of one kumu hula born before 1932 that transmit Indigenous culture?

- What are the key instructional practices of the current hula instructors?

- How do current hula instructors believe that they may alter their instructional practices based on a knowledge of the stories shared by the kumu hula born before 1932?

The resulting stories told linked the past with the present. I have integrated the first four findings in response to the first two sub-questions.

Finding 1: Cultural Knowledge, Values, and Norms Embed Instruction That is Relational

The results illustrated in detail the cultural knowledge of the hula, norms, and values handed down from Aunty to her teachers. Consistent with the existing literature, the instructors have transmitted the cultural knowledge of hula through a traditional, hālau-based teaching system (Imada, 2011; Kaholokula et al., 2018). The participants used an inductive teaching approach (Emerson, 1909/1998), layering knowledge of the dances with content including the history, dance movements, and meanings. This structure functions to enable the cultural memory to pass from one generation to another as part of a hula lineage (Kaeppler, 2004). However, Aunty's personal beliefs shaped her

instructional approaches and influenced the knowledge, i.e., the chants and dances worthy of transmission. This finding is supported by Rowe (2020), who noted that the kumu hula determined what knowledge was transmitted to students.

The participants taught the students learning skills and behaviors, including focused observation, memorization, and reflexivity. Rowe (2020) and Kaomea et al. (2019) recognized these competencies as necessary to gain cultural knowledge. This current research finding helps fill a gap in the literature on how knowledge is transmitted from the past to the present in one traditional hula school.

Finding 2: Instructional Approaches Align With Hawaiian Values That Focus on the Students

Participants in this study have kept instructional strategies of Aunty, viewing students as their best teachers. These student-centered methods are part of a somatics-based approach described by Dragon (2015). Although somatics emphasizes learning through embodiment and use of reflexivity, Mabingo (2018b) and Walker (2019) have noted its lack of emphasis on the cultural aspects of dance. This study helps fill this literature gap by bringing more attention to the cultural context embedded in hula instructional approaches. In addition, these findings contribute to the body of knowledge related to collaborative, inclusive, and reflective practices to promote student well-being (Barr & Oliver, 2016) individually and collectively (Fortin, 2018; Schupp, 2017).

Finding 3: Current Instructors Sustain Tradition Balanced With Innovation

The participants' stories reflected their efforts to sustain cultural traditions while employing innovative methods. Instructors adhered strictly to a teach-as-taught approach

for ancient hula that preserved the cultural memory and ancestral connections of their hālau. However, for modern hula, instructors had more flexibility in creating choreography. Also, the participants used performance activities to teach students to think on their feet, keep going despite mistakes, and tell the story with aloha. This finding aligns with Rowe (2020), who noted the attributes of a knowledgeable hula dancer. Performance in competitive hula events extended learning to affirm cultural identity (Kaeppler, 2004), share knowledge, and appreciate other competing hula schools. Except for two studies of U.S. dance competitions by Schupp (2019, 2020a), very limited information is available on the benefits of dance competitions, and no studies address the learning benefits of hula competitions. This research contributes to filling this significant research gap.

Finding 4: Hula Education Teaches Life Lessons Beyond the Hālau, or School

One significant finding that unexpectedly emerged from the data was that participants applied skills and abilities learned in hula to their lives outside the hālau. Aunty taught values, beliefs, and behaviors that enabled her dancers to find meaningful careers. Her life's example had an enduring influence on the participants. Participants described how their experience in hula taught them skills in communication and leadership. The participants expressed that the life lessons learned from hula flowed into their educational aspirations, careers, families, and relationships. These findings contribute to raising awareness of how hula education has benefitted the instructors in one hālau. Since there is scant information about the value of dance education

(Davenport, 2017; Longley & Kensington-Miller., 2020) in terms of life skills transfer, these findings contribute to filling this gap.

Finding 5: Limited Evidence of Alteration of Instructor Practices Based on Knowledge of the Kumu Hula's Stories

In response to Sub-question 3, participants did not express any alteration of their approach based on the stories of Aunty, except for consideration in specific teaching situations. However, viewing the circle dance elucidated a reaction from P1, who had insight into why Aunty used this method. The circle method instilled in students the cultural value of lokahi, or unity. The circle is a method to build community and is significant in diverse dance forms (Banks, 2019; Chang & Hogans, 2021; MacPherson, 2018). However, the circle is one of many instructional approaches seen in this current study. Since the responses to Sub-question 3 revealed limited evidence of instructional alterations, more study is needed about this aspect.

Finding 6: A Tradition of Innovation Exists in the Hālau, or School

The conceptual framework revealed a tradition of innovation in the halau (school). Instructors passed on cultural knowledge, values, and hālau norms through their teaching. As a result, the tradition of innovation for this hālau (school) involved keeping the essence of the cultural knowledge but adjusting the instructional approach. As the circumstances have changed at a societal level, the instructional approaches have evolved to perpetuate the cultural traditions. However, at an individual level, the instructors continually looked for ways to keep students interested. Due to these challenges, instructors had to decide what knowledge they would pass on. Although this ongoing

tension between innovation and cultural preservation was noted in the literature

(Stillman, 202; Wilson-Hokowhitu, 2019), Hawaiian culture values practical knowledge

(Meyer, 2008), which guides the decision-making process.

Finding 7: Instructional Innovation is a Kākou (or, Everybody) Thing

The conceptual framework helped to explain the interactive process of

instructional innovations. In Hawaii, a popular phrase often heard is: *It's a kākou thing*.

This saying is in response to situations that should consider the common good. I found

that the participants collectively sought new ways to help their students learn; likewise,

students contributed to the innovation process through their responses to the instruction.

This observation aligns with Clapp (2017) and Meyer (2008), who found that ideation

and the creation of knowledge resulted from interactions with others. In this regard, the

students contributed to the innovation process that led to new methods of instruction. The

results influenced not just the individuals but also the school. This continuous, cyclical

flow of ideas is consistent with the double-loop process described by Clapp (2017).

Finding 8: Innovation is a Spiritual Matter Because Everything is Connected

The conceptual framework offered a way to explore and understand the spiritual

dimension of instructional innovations. When participants applied their skills to address

an issue, they looked to sources beyond themselves for guidance. Through the

intelligence of aloha, they accessed information through a connection with the body,

mind, and spirit (Meyer, 2008). The use of traditional protocols in class elevated the

students' awareness of their divine connection to their ancestors. Practices of observation,

memorization, and reflexivity enabled teachers and students to access knowledge and

receive guidance. Such behaviors as reading signs, speaking about Aunty in the present tense, integrating religious beliefs, and genealogical connections were evidence that the ancestors actively worked with loved ones living in the present.

Limitations of the Study

It is important to consider the limitations of this study. First, the study was limited to the instructional practices used by one hula school in Hawaii and reflected one hula tradition. As a result, there were a small number of participants; however, each one took part in two in-depth interviews. Their responses reflected their experiences teaching and learning in their hālau, or school. Therefore, the instructional methods, cultural norms, and practices were relevant to this particular group. However, there are many hula schools in Hawaii and abroad. Other hālau may observe different traditions and practices depending on their lineage. Hālau outside of Hawaii, including those in the U.S. mainland and abroad, may differ in practices.

Second, data collection occurred during a time when COVID-19 limited routine activities throughout Hawaii, including travel. The unanticipated restrictions meant that it was not possible to visit the archive or conduct in-person interviews. Because building and maintaining relationships is a central value in the Native Hawaiian culture, it was crucial to sustaining these connections. I communicated regularly through email, phone calls, texts, and Zoom. I worked closely with the archive organization, which developed an alternative means to access the archival collection remotely. I repeatedly used member checking as I distilled quotes to ensure that the resulting stories accurately reflected their voices. Also, I obtained permission from the archive to use excerpts of quotes from the

records collection. Throughout this period, I kept participants and the archive informed of progress. Although the COVID-19 pandemic affected data collection methods, the situation may have a positive impact. This situation provided relevancy and a stimulus for discussion of the instructional changes made by participants, resulting in in-depth perspectives of innovation.

Recommendations

The purpose of this study was to gain an understanding of how hula instruction has evolved to transmit cultural knowledge and how past methods may influence current instructor practices in sustaining a vibrant culture. The stories shared through archival records and interviews revealed a tightly knit group of instructors dedicated to continuing a hula lineage that began with one kumu hula born before 1932. This research not only revealed stories of instruction that transmitted the cultural knowledge of hula but showed how Hawaiian values, norms, and the enduring philosophy of the founder had influenced the instructors in the present. Most notably, the founder established a tradition of innovation. This mindset was pivotal in this hālau because instructors such as P1 have expanded this interpretation to include instructional approaches that benefit students well beyond the classroom. The instructors continually seek strategies to help students learn and love hula as well as help them grow. With consideration of these findings, I offer these recommendations for further research.

- Sub-question 3 asked: How do current hula instructors believe they may alter their instructor practices based on a knowledge of the stories shared by the kumu hula born before 1932? Because the results showed limited evidence of

such alterations, further studies are recommended to answer SQ3. One possibility would be to study another archive collection of another kumu hula and interview instructors related to that hula lineage.

- Community-based archives, such as the source in this study, curate cultural knowledge and artifacts of individuals no longer living. These collections serve as a link to the past for those in the present. This relationship is an important source of knowledge for future generations. Further use of these collections for research purposes is recommended.

- Findings show that the life skills learned in this hālau reflect a holistic educational process that may complement and support other knowledge domains. Further study of the benefits of hula as part of an academic program or an extracurricular learning experience is recommended.

- The focus of this study was on one hula school in Hawaii. However, the literature showed little attention to the transmission of hula knowledge and culture outside of Hawaii, including the U.S. mainland and international settings. Further study of kumu hula who have trained in Hawaii, but now live and instruct outside of Hawaii, is recommended.

Implications

Chapter 1 introduced a common problem that policies influencing learning and instruction practices had excluded Indigenous perspectives. Specifically, this problem focused on Western forms of dance education that reflected postcolonial practices. These practices had a far-reaching effect on the Indigenous Native Hawaiian culture, including

suppressing the Hawaiian language and cultural traditions. Because hula contains cultural knowledge, it was important to understand how teachers transmitted this knowledge in the face of societal pressures.

Positive Social Change

This study has implications for positive social change. Although this study did not focus on policies at the societal level per se, it did examine the changes that one instructor made in reaction to such external influences. In that context, social change began with the individual known as Aunty. Her reactions to conditions such as the influence of Christianity and the rise in tourism led to instructional innovations in her hula school to perpetuate hula and sustain a vibrant culture.

However, Aunty made changes to her instruction for reasons that had broader social implications. Her most significant effort was to engage her students in a manner that would inspire their love of hula. Their learning included cultural knowledge, values, and positive behaviors such as observation, reflexivity, and showing aloha to others. If students loved hula, they would learn and appreciate their culture. If students embraced these values and beliefs, they would develop into responsible adults who would contribute to the health and well-being of their community and beyond. The participants of this study are living examples of such a philosophy.

This way of life, however, is inclusive. One does not need to be Hawaiian to study hula or to embrace Hawaiian cultural values. This concept aligns with the growth of an idea, as described by Clapp (2017). In summary, learning and practicing these behaviors could bring positive impacts at the societal level.

Methodological Implications

As seen through the lens of the 'ae kai conceptual framework, Aunty established a culture of innovation that remains with the participants to the present. Like Aunty, they continue to make changes to instruction, and when necessary, to revise or improve while still preserving the essence of their hula tradition. This tradition is dynamic and flows with the changes characteristic of the 'ae kai, the space between Indigenous Hawaiian and Western worldviews. From this context, individuals adapt and improve to benefit not only their own well-being of themselves but the community at large. Such a concept could extend beyond the community, offering broader societal implications.

From a methodological perspective, several implications are apparent. Research for this topic entailed an in-depth examination of the participants of one hula school. Due to the purposive sample criteria, I had little control over the sample size. However, I interviewed each participant twice, building data from the initial interview to the archival elucidation interview. This method produced detailed, enriched data that exceeded my expectations. In retrospect, I found that there was value in conducting more than one interview with each participant. It is doubtful that I would have gotten such in-depth responses if I had done only a single round of interviews. Adding archived video recordings as part of the archival elucidation interviews added richness in detail. In addition, this second interview provided opportunities for me to probe previous questions and add questions that arose from the initial interviews. I found that this method promoted emotional connections between the participants and myself to Aunty. In fact, at many times, I felt as if Aunty was taking part in the interviews. This sense of connection

was quite poignant as we viewed the video recordings of Aunty; her voice from the past

mingled with our voices in the present created a storytelling space that transcended time.

This experience revealed the deep significance of archival research as a source

connecting the past and present. The voice of Aunty lives through her students who now

teach hula.

This qualitative study used Indigenous research methodology. This methodology

places emphasis on research tools that empower Indigenous communities. However, I

believe that this approach can extend beyond these communities. The researcher carries a

moral responsibility to the community to care for and protect the stories shared. Although

my study is complete, my relationship with this community will continue. Based on my

experience, I offer several recommendations. One recommendation is to establish a

relationship with the community *before* conducting research. Even as a cultural member,

it takes time and patience to build trust. Another recommendation is to approach

interactions with a spirit of sincere interest, curiosity, and humility. Spend more time

observing and listening to the elders than talking. This practice promotes reflexivity and

the opportunity to hear more stories. Finally, maintain relationships with the community

during and after the study.

Conclusion

The purpose of this study was to gain an understanding of how hula instruction

has evolved to transmit cultural knowledge and how past methods may influence current

instructor practices in sustaining a vibrant culture. I examined the stories told by the

instructors of one hālau hula, or hula school, spanning three generations to meet this

objective. Although instructional approaches were the focus of the study, the stories shared revealed much more than instructional methods and dance movements. Aunty established a foundation of cultural knowledge, values, and a teaching philosophy focused on students. Also, Aunty created a culture of innovation. These influences are still prevalent in the participants' teaching approaches. But because students' needs evolve, the instructors continually seek ways to engage students' interest and love of hula. The ongoing challenge is to balance these innovations while maintaining the essence of hula traditions. This tradition of innovation refutes the notion that Indigenous Hawaiian knowledge is static—it is just the opposite. This study is an example of how innovation is embedded in the culture of one hālau and is a means to ensure its survival. With a foot in the ancient and a foot in the modern, instructors give their students tools to learn hula and life skills to solve complex problems. This endeavor is more than teaching hula; it is a guide for living.

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Appendix A: Framework for Participatory Creativity

Figure A1

Participatory Creativity and Double Loop Process (Local Level)
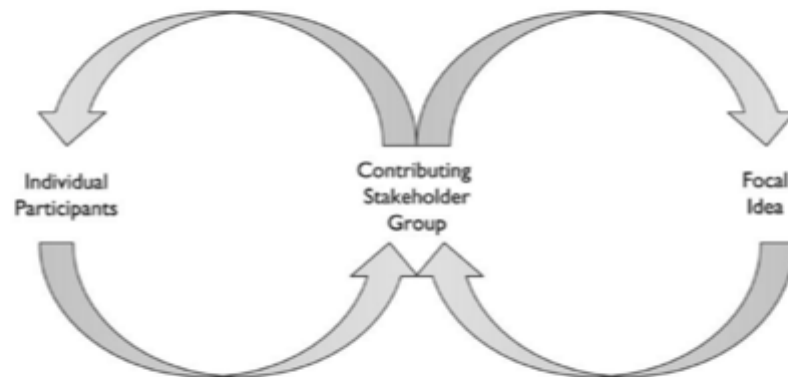
Note. Illustration of innovation process at a local group interactive level. Adapted from

"Figure 8.3 Participatory Creativity and the Double Loop Process of Learning and

Development (Local Level)," by E. P. Clapp, 2017, *Participatory Creativity: Introducing*

access and equity to the creative classroom" [Kindle version], p. 177. Copyright ©2017

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Figure A2

Participatory Creativity and Triple Loop Process (Cultural Level)
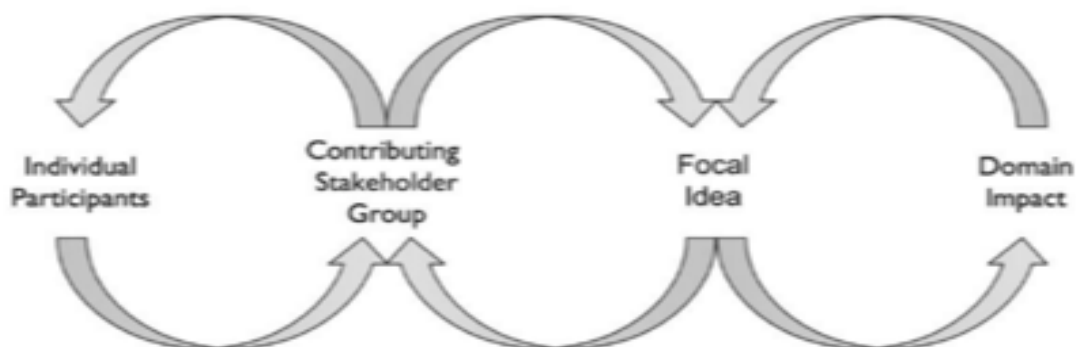
Note. Illustration of innovation process at the cultural interactive level. Adapted from

"Figure 8.4 Participatory Creativity and the Triple Loop Process of Learning and

Development (Cultural Level)," by E. P. Clapp, 2017, *Participatory Creativity:*

Introducing access and equity to the creative classroom" [Kindle version], p. 177.

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Appendix B: Initial Interview Questions

1. I'd like to start by hearing your story of how you became a kumu hula. How did this come about?
        Experience as student?
        Significant learning experiences?
        What inspired you to become a teacher?
        Training to become a kumu hula?

2. I would like to hear some stories about your teacher.
        Who was your kumu? Tell me about _____.
        What did a typical class day look like?

3. How would you describe how your kumu taught?
        Do you have a story in particular that could describe that approach?

4. I'd like to know about the challenges that teachers face in teaching hula. What challenges did your kumu face in teaching hula?
        What challenges?
        How did they happen?
        How was this overcome?
        What was the result?
        Instances where your kumu changed instruction and why?

5. Based on what you've shared, tell me how these experiences have shaped you as an instructor [with specific term referencing their level of teaching].
        How you teach compared to how your kumu taught. What does a typical day in your class look like?
        Examples of similarities and why
        Examples of differences and why
        What challenges?
        How did they happen?
        What did they do?
        What was the result?

6. What does innovation in teaching hula mean to you?
        Do you consider your kumu as innovative and why?
        Do you consider yourself as innovative and why?

7. What other stories would you like to share as we wrap up?

8. What questions do you have for me?

Appendix C: Archival Elucidation Interview Questions

Part 1. Filling the gaps. Background questions to help clarify previous interview responses and get more information on questions raised.
Prompts
- What year were you born?
- When did you start teaching classes?
- What level are you in your hula training?
- Do you speak Hawaiian?
- Are you of Hawaiian ancestry?
- Did P1pass along knowledge of hula learned from Tūtū Sam's tradition to you? Why or why not? Have you taught it? Why or why not? What are your thoughts about seeking knowledge about other hula traditions that are outside of your hula lineage?
- How do your worldview or spiritual/ personal beliefs influence how you learn and teach?
- How does competition play a role in hula? What does it teach?
- What are your career aspirations, in and outside of the hālau?
- How has hula influenced your career choices?
- How do you balance your life with hula?
- What hālau protocols do you use in your classes?

Part 2. Aunty in action. After viewing selected video segments of Aunty instructing workshops, ask these questions:
Prompts
- Why do you think she chose that particular hula?
- What is the mana'o for this story and how is it relevant in the present?
- How do you choose a song to teach?
- How does this compare to teaching a routine hālau class? Aunty's approach? Your approach?
- Why did she have students perform for each other?
- What were the papers and why are they important? Aunty said that her kumu, Lokalia, did not like students to ask questions. Also, students had to memorize everything. What are your thoughts on this? Do you consider that innovative or traditional?
- How did Aunty assess learning?
- What was the most important thing to learn?
- How do you assess learning? How do you give students feedback?
- How does Aunty's approach compare to teaching in hālau classes? What is your opinion on these practices of Aunty as traditional or innovative? What practices shown here would you consider using?

Part 3. Wrap-up and reflection questions.

Prompts

- What is the most important thing that Aunty taught?
- What is the most important thing that P1 has taught you?
- What was the most important thing you learned in becoming a kumu/teacher/instructor?
- If you could do something over, what would it be?
- What are you proudest of as a teacher?
- What is your kuleana in teaching hula?
- What advice would you give to a hula student who has teaching aspirations?
- What questions do you have for me?

Appendix D: Interview Guide

Stories of Learning and Instructional Practices in Traditional Hawaiian Hula Education

Invitation

Aloha _____,

I'm in the Walden University PhD Education program with a specialization in Learning, Instruction, and Innovation. My dissertation title is "Stories of Learning and Instruction in Traditional Hawaiian Education." My research will involve study of [founder] and [founder's] instructional practices. I will be using the [archive name] to explore [his/her] teaching. Since you are connected to this person by hula lineage, I would like to interview you to understand your current instructional approaches. Then, I would like to have a second interview session with you to get your perspective on [founder's] instructional approach by reviewing archival materials. I anticipate that each interview will be one hour in length. Your participation in this study will help to contribute to an increased understanding of instructional practices used in hula and raise awareness of the archival resources that support our Native Hawaiian community.

If you are willing to participate in this study, you will need to complete an Informed Consent statement. I can email this to you (note: this will originate from my Walden U email address). I can also send you a list of questions in advance. Hopefully the entire process would not take more that 2 hours of your time. We can do the first interview in person, by phone or online (like videoconferencing)—whatever is most convenient for you. If none of those options will work, we can do the interview via email. However, the second interview involves review of archival materials, so, if possible, I would need to do this session with you in person at the archival site.

Please let me know if you would be willing to be interviewed and if so, your availability the month of _____. I live on Hawaii Island but will be at the archive on Oahu for extended periods, if either location is convenient for you.

As always, you can reach me on my cell [cell phone number], or by email (email address) if you have questions.

Mahalo!
Lynn

Interview Protocol

Introductory Statement

Hi, I am a doctoral student at Walden University. My research focus is Native Hawaiian education. I am studying instructional practices used by kumu hula past and present. Although I will be gathering information about your kumu using the archives, I would like to also know about the practices of present-day teachers. Since you have a hula lineage with _____, I believe that your expertise will help me to gain some insights as to what I've seen in the archives as well as provide a contemporary perspective of teaching and learning hula. I'm hoping that this study will raise awareness of the value of this archive and contribute to research on hula instructional approaches. So, thank you for agreeing to talk to me.

Before we get started, I have a few questions. Can I record this interview? I would also like to take some notes as we go. Did you bring anything such as a photo, or other memorabilia to show as part of the interview? [If yes] Could I take a photo of that? How do you wish to be identified? What name would you like to use? Also, I will be creating a transcript. Would you like an opportunity to review and edit your remarks?

[Begin recording]

[If sent in advance] I emailed some questions to you earlier, so you probably have an idea of what we'll discuss today. Just know that there aren't any right or wrong answers. I want to hear about your experience. At the same time, your participation is voluntary, so you are free to answer questions or refrain from answering. Any questions before we get started? Ok, let's begin.

Interview Questions—First Session.

1. I'd like to start by hearing your story of how you became a kumu hula. Can you tell me how this came about?
 Experience as student?
 Significant learning experiences?
 What inspired you to become a teacher?
 Training to become a kumu hula?
2. I would like to hear some stories about your teacher.
 Who was your kumu? Tell me about _____.
 What did a typical class day look like?

3. How would you describe how your kumu taught?
 Do you have a story in particular that could describe that approach?

4. I'd like to know about the challenges that teachers face in teaching hula. What challenges did your kumu face in teaching hula?

        What challenges?
        How did they happen?
        How was this overcome?
        What was the result?
        Instances where your kumu changed instruction and why?

5. Based on what you've shared, tell me how these experiences have shaped you as an instructor (with specific term referencing their level of teaching).

        How do you teach compared to how your kumu taught? What does a typical day in your class look like?
        Examples of similarities and why
        Examples of differences and why
        What challenges?
        How did they happen?
        What did they do?
        What was the result?

6. What does innovation in teaching hula mean to you?

        Do you consider your kumu as innovative and why?
        Do you consider yourself as innovative and why?

7. What stories would you like to share as we wrap up?

8. What questions do you have for me?

Closing Statement

Thanks for sharing your experiences and insights. I'll be going over my notes and the transcript over the next couple of days. What you've told me today will be used for this study only and your responses will be kept confidential. However, if I asked to quote you, these will be anonymous. Is it okay to contact you if I have any follow up questions?

Archival Elucidation Interview Protocol

Introductory Statement

Hi again. Thanks so much for agreeing to talk to me. Originally, we planned to meet at the archive. But because of COVID19, I had to come up with a way to conduct this interview virtually. I appreciate your flexibility and willingness to continue with these adjustments.

As I mentioned in our initial interview, I am a doctoral student at Walden University. My research focus is Native Hawaiian hula education. I am studying instructional practices used by kumu hula past and present. I'm hoping that this study will raise awareness of the value of this archive and contribute to research on hula instructional approaches.

Since we last talked, I have been gathering information about Aunty from the archive. Today, I'd like for us to explore this collection of memories of Aunty further. I believe that your experience and expertise will help me to answer some questions as to what I've seen in the archives. Also, I have a copy of your transcript in case we need to refer back to it. Have you had a chance to look over it?

Before we get started, I have a few questions. Can I record this interview? I would also like to take some notes as we go. Also, I will be creating a transcript of this session. Would you like an opportunity to review and edit your remarks? Also, would you like to see my analysis of the results? One more thing: I'm not sure how long this will take, but we can take a break at any time. Please let me know if you need to pause.

I'll start the recorder.
Begin recording with both devices]

Just know that there aren't any right or wrong answers. I want to hear about your experience. Also, know that this interview is different from the initial one, since we will view records on the fly to get your impressions and perspectives. At the same time,

your participation is voluntary, so you are free to answer questions or refrain from answering. Any questions before we get started? Ok, let's talk story.

Today we'll view records from the following list (read).
[video description 1]
[video description 2]
[video description 3]

Archival Elucidation Interview Questions.

This interview consists of 3 parts. In the first part, I have general questions as a follow-up to your last interview. Your responses will help fill some of those information gaps. In the second part, we will view Aunty in action, teaching two workshops. In the third part, we'll spend some time reflecting on what we've viewed and wrap up the session. There is about 20 minutes of video that we'll watch and discuss.

Part 1—Filling the gaps	Research sub question	Participant	Video segment/Reference	Information needed/question	Response
	SQ2: What are the key instructional practices of the current hula instructors?			First, I have some questions as a follow up from your initial interview. Then I'll show you a video segment of Aunty to get your perspective.	
		P2, P3		What year were you born? When did you start teaching classes? What level are you in your hula training? Do you speak Hawaiian? Are you of Hawaiian ancestry?	
		P1		Here is our first segment from 2005, which was part of an oral history interview. [view segment] Did P1pass along knowledge of hula learned	

				from Tūtū Sam's tradition to you? • Why or why not? • Have you taught it? Why or why not? • What are your thoughts about seeking knowledge about other hula traditions that are outside of your hula lineage?	
		P2, P3		How do your worldview or spiritual/ personal beliefs influence how you learn and teach? What are your thoughts about seeking knowledge about other hula traditions that are outside of your hula lineage?	
		All		How does competition play a role in hula? What does it teach?	

		P2, P3		What are your career aspirations, in and outside of the hālau? How has hula influenced your career choices? How do you balance your life with hula?	
		P2, P3		What hālau protocols do you use in your classes?	
Part 2— Aunty in action	*SQ3:* How do current hula instructors believe they may alter their instructional practices based on a knowledge of the stories shared by the kumu hula born before 1932?			In this part, we will view excerpts from two of Aunty's workshops. We won't view the entire videos because that would take several hours. Instead, we'll view the highlights of each workshop. If we need to repeat a segment, just ask.	
		All	Workshop Documentation Vimeo.com [name of hula 'auana]	The first workshop in [date] features a hula 'auana known as [name of hula 'auana]. Aunty taught at the International Waikiki Hula Conference. Let's take a look.	

				[View segment.] Why do you think she chose that particular hula? • What is the mana'o for this story and how is it relevant in the present? How do you choose a song to teach?	
				I'm going to fast forward through a series of teaching activities. As we go, describe what is happening and why. [View segments and wait for response, then state "next"] • How does this compare to teaching a routine hālau class? Aunty's approach? Your approach? • Why did she have students perform for each other? • What were the papers and why are they important?	

				How did Aunty assess learning? • What was the most important thing to learn? How do you assess learning? How do you give students feedback?	
				How does Aunty's approach compare to teaching in hālau classes? What is your opinion on these practices of Aunty as traditional or innovative? What practices shown here would you consider using?	
		All	Workshop Documentation Vimeo.com [name of hula kahiko]	In the second workshop, the same day as the other, Aunty taught [name of hula kahiko]. Let's take a look.	
				[View segment] How is this hula different from the previous workshop? Why do you think she chose that particular hula?	

				How do you choose a song to teach? How do you research a hula you want to teach?	
				I'm going to fast forward through a series of teaching activities. As we go, describe what is happening and why. [View segments, get response, and then say "next"] • How does this compare to teaching a routine hālau class?Aunty's approach? Your approach?	
				[view segment] What is the mana'o for this mo'olelo and how is it relevant in the present?	
				[view segment] Aunty said that her kumu, Lokalia, did not like students to ask questions. Also, students had to memorize everything. What are your thoughts on this?	

				So how did written papers come into instruction? Do you consider that innovative or traditional?	
				[view segment] How did Aunty assess learning? What was the most important thing to learn? How do you assess learning? How do you give students feedback?	
				How does Aunty's approach compare to teaching in hālau classes? What is your opinion on these practices of Aunty as traditional, or innovative? What practices shown here would you consider using? What is it that has changed your perspective?	
Part 3— Wrap-up and reflection		All	Panel Discussion	After reviewing all these records, and before we wrap up, I'd like to get your reflections about your instructional approaches that	

				are part of this hula lineage. As part of this final section, here is one more video segment of Aunty. We'll go back in time to 2003 when Aunty participated in a panel discussion. [View segment]	
				What is the most important thing that Aunty taught?	
				What is the most important thing that P1 has taught you?	
				What was the most important thing you learned in becoming a kumu/teacher/instructor? If you could do something over, what would it be? What are you proudest of as a teacher? What is your kuleana in teaching hula? What advice would you give to a hula student who has teaching aspirations? What questions do you have for me?	

Closing Statement

Thanks for sharing your experiences and insights. I'll be going over my notes and the transcript over the next couple of days. What you've told me today will be used for this study only and your responses will be kept confidential. However, if I asked to quote you, these will be anonymous. Is it okay to contact you if I have any follow up questions?

STOP Recorder.

Appendix E: Data Collection Procedures Table

	RQ1: How have instructors, connected through a traditional hula school, approached instruction?	SQ1: What are the key instructional practices represented in the stories of one kumu hula born before 1932 that transmit the Indigenous culture?	SQ2: What are the key instructional practices of current hula instructors?	SQ3: How do current hula may alter their instruction knowledge of the stories s born before 1932?
Where data were collected	Archive online platform using Vimeo and Zoom interviews	Archive online platform	Zoom interviews	Zoom interviews + joint v through Vimeo
Frequency of data collection	Access to archive collection+ 3 initial interviews + 3 archival elucidation interviews	Access to Archive online from June 2020 – January 2021	3 initial interviews April 2020	3 archival elucidation inte October 2020
Duration of data collection	April – October 2020 (7 months)	4-month period	3.5 total interview hours	6 total interview hours
Recording data (how)	Field texts (include audio recordings, transcripts) and research texts	Rewriting (Scoping, Mapping, Document Analysis), field texts which may include visual images, research texts	Field texts include audio recording, visual images, and transcript; interview summary	Field texts include audio r and transcript; interview s
Follow-up if too few people	Determined in process	Determined during interview process	3 participants were sufficient	3 participants were suffici
Participants exit study (debriefing process)	Share findings with archivist and participants.	Debriefed archivist as closeout; member checking of interview transcripts and results.	Member checking of interview transcripts	Member checking of inter
Follow up procedures (like follow-up interviews)	Determined in process. Iterative: Accessed archive collection to clarify info discovered during interviews; follow-up emails from interviews with participants	Accessed archive collection to clarify info discovered during interviews or in analysis of field texts; follow-up emails from interviews with participants	Used Archival Elucidation interview to follow-up with participant because further analysis revealed gaps between data sources	Used email to follow-up v results when further analy data sources

Appendix F: Alignment of Interview Questions to RQ, SQs, and Conceptual Framework

Primary Research Question: How have instructors, connected through a traditional hula school, approached instruction?
Associated Initial Interview Questions
What is your story of how you became a kumu hula/instructor?
Prompting Questions:
Tell me about your experience as a student.
Tell me about any significant learning experiences.
What inspired you to become a teacher?
Tell me about your training to become a kumu hula/instructor.
Associated Archival Elucidation Interview Questions (prior to viewing videos)
Background questions to clarify initial interview responses and get more information on questions raised.   *Prompting Questions*:
What year were you born?
When did you start teaching classes?
What level are you in your hula training?
Do you speak Hawaiian?
Are you of Hawaiian ancestry?
How do your worldview or spiritual/ personal beliefs influence how you learn and teach?
What are your career aspirations, in and outside of the hālau?
How has hula influenced your career choices?
How do you balance your life with hula?
Secondary Research Question: What are the key instructional practices represented in the stories of one kumu hula born before 1932 that transmit the Indigenous culture?
Associated Initial Interview Questions
What stories can you share about your kumu?
Prompting Questions
Who was your kumu? Tell me about (Kumu's name).
Take me through a typical class day with your kumu. How would that look?
How would you describe your kumu's teaching style? Do you have a story that describes your kumu's approach?
What sorts of challenges did your kumu face in teaching hula? How did your kumu overcome them?
Tell me about any instances where your kumu had to change instruction.
Associated Archival Elucidation Interview Questions (responding to video segments)
Did P1pass along knowledge of hula learned from Tūtū Sam's tradition to you? Why or why not? Have you taught it? Why or why not? What are your thoughts about seeking knowledge about other hula traditions that are outside of your hula lineage?

I see you've brought something today. What is the story behind it? What is it? Why is it important to you?
Why do you think she chose that particular hula?
Why did she have students perform for each other?
What were the papers and why are they important? Aunty said that her kumu, Lokalia, did not like students to ask questions. Also, students had to memorize everything. What are your thoughts on this? Do you consider that innovative or traditional?
How did Aunty assess learning?
What was the most important thing to learn?
Secondary Research Question: What are the key instructional practices of the current hula instructors?
Associated Initial Interview Questions
Based on what you've shared, tell me how these experiences have shaped you as a teacher.
Prompting Questions:
How would you compare your teaching style to your kumu's? Describe a typical day in your class.
What are examples of how you are similar and why?
What are examples of how you are different and why?
What are challenges you face in teaching hula?
Please tell me a story about your challenges and how you overcame them
Along those lines, have you ever changed your instruction? Please explain
What does innovation in teaching hula mean to you?
Do you consider your kumu as innovative and why?
Do you consider yourself as innovative and why?
Associated Archival Elucidation Interview Questions (responding to video segments)
I see you've brought something today. What is the story behind it? What is it? Why is it important to you?
How does competition play a role in hula? What does it teach?
What hālau protocols do you use in your classes?
How does this compare to teaching a routine hālau class? Aunty's approach? Your approach?
What is the mana'o for this story and how is it relevant in the present?
How do you choose a song to teach?
How do you assess learning? How do you give students feedback?
What was the most important thing you learned in becoming a kumu/teacher/instructor?
If you could do something over, what would it be?

Secondary Research Question: How do current hula instructors believe they may alter their instructional practices based on a knowledge of the stories shared by the kumu hula born before 1932?
Associated Archival Elucidation Interview Questions (responding to video segments)
How does this compare to teaching a routine hālau class? Aunty's approach? Your approach?
Why did she have students perform for each other?
How do you assess learning? How do you give students feedback?
How does Aunty's approach compare to teaching in hālau classes? What is your opinion on these practices of Aunty as traditional or innovative? What practices shown here would you consider using?
If you could do something over, what would it be?
What do you see as your kumu's role and responsibility in teaching hula?

Alignment of Initial and Archival Elucidation Interview Questions with the Conceptual Framework:

'Ae kai Conceptual Framework
Associated Initial Interview Questions
What is your story of how you became a kumu hula?
What stories can you share about your kumu?
Based on what you've shared, tell me how these experiences have shaped you as a teacher.
What does innovation in teaching hula mean to you?
Do you consider your kumu innovative and why?
Do you consider yourself innovative and why?
Associated Archival Elucidation Interview Questions
Did P1 pass along knowledge of hula learned from Tūtū Sam's tradition to you? Why or why not? Have you taught it? Why or why not? What are your thoughts about seeking knowledge about other hula traditions that are outside of your hula lineage?
What were the papers and why are they important? Aunty said that her kumu, Lokalia, did not like students to ask questions. Also, students had to memorize everything. What are your thoughts on this? Do you consider that innovative or traditional?
What is the most important thing that Aunty taught?
What is the most important thing that P1 taught you?
What was the most important thing you learned in becoming a kumu/teacher/instructor?
If you could do something over, what would it be?
What do you see as your kumu's role and responsibility in teaching hula?
What are you proudest of as a teacher?
What is your kuleana in teaching hula?
What advice would you give to a hula student who has teaching aspirations?

Appendix G: Sample Worksheet of Archival Records That Align with RQs and Framework (data collection and developing

field texts)

RQ: How have instructors, connected through a traditional hula school, approached instruction?
- *SQ1:* What are the key instructional practices represented in the stories of one kumu hula born before 1932 that transmit the Indigenous culture?

- *SQ2*: What are the key instructional practices of the current hula instructors?

- *SQ3:* How do current hula instructors believe they may alter their instructional practices based on a knowledge of the stories shared by the kumu hula born before 1932?

Conceptual Framework: 'Ae kai = Meyer's triangulation of Meaning + Clapp's participatory creativity
Provisional codes:
     Biographical (life history)
     Instruction (what method, practice)
     Teaching style (approach, philosophy)
     Challenges (internal, external, etc.)
     Instructional changes (what, why)

Scoping and Mapping the Archive Collection: Day 1 Checklist

Step 1. Scoping the Collection—Getting and Overview

Collection Name:

Number of archive boxes/units:

Inventory exists (Y/N)

How I scanned the collection:

Things I noted:

Step 2. Mapping the Collection—Identifying heterotopic aspects (i.e., reflections of a unique reality/world organized and interpreted by archive.)

2.1 Scan each box. (If multiples, start with oldest box, then latest, then middle)

Box Number	Contents	Themes/Concerns	Absences?	What should I record today? How and Why?	Need archive approval?	Relevant to my topic?	If so, does it justify further examination?

2.2 Summary. In scanning the collection, my overall observations are:

What is the organization of the collection and its boundaries?

What are the contents?

What are the overall themes or concerns?

What are the noted absences?

What should I record right now?

How should I record it?(Should I make copies or take pictures? Does the archive approve?)

Why should I record it?

Is it relevant to my topic? If so, does it justify further examination?

2.3 What was most interesting in the collection? Re-read in detail and make detailed notes.

2.4 End of session: What is worth copying (if allowed)?

2.5 Check with archive to see if there is any else relevant and note for follow up.

2.6 Go over notes made, add reflections and anything additional.

2.7 Report back to archivist the tasks completed and work progress.

Note. Scoping and mapping the archive collection. Adapted from "Archival methodology inside the black box: Noise in the archive!" by L. Stanley, 2017, *The Archive Project: Archival Research in the Social Sciences* [Kindle version] (pp.47-48).

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Appendix H: Sample Worksheet of Archival Records Document Analysis (data collection and developing field tex...

Completed <u>after</u> scoping and mapping the collection (Day 1). Record for each document analyzed in the collection.

Document/Record Identification	Record location within collection	Date accessed	Location within record if applicable (page, frame)	Type/ Format	Context 1: Historical context at time of creation?	Pre-text: What led to creation of this?	Text and Intertext: Meta data: Who?	Text and Intertext: Meta data: When?	Text and Intertext: Meta data: Where from?	Text and Intertext: Meta data: To whom?	Text and Intertext: Meta data: Where to?	Content: What is it and appearance?	Structure: Authoritative voice, tone, audience	Post-text: What happened after document/artifact was created?	Post-text: Direct impact on subsequent actions?	Post-text: Records that show what action happened next?	Context 2: Historical context after document/artifact released?	Summary of gaps, inconsistencies, or wonderings	Questio... to ask ... as a fol... intervi... furthe... explair... comme...

Note. Archival Document Analysis. Adapted from "Archival methodology inside the black box: Noise in the archive!" by L. Stanley, 2017, *Th...*

Research in the Social Sciences [Kindle version] (pp.53-57). New York, NY: Routledge. Copyright ©2017 by Niamh Moore, Andrea Salter, L...

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Appendix I: Access & Use Terms (Remote)

Email: ███████████ **Phone:** ████████

Access & Use Terms (Remote)

This Access & Use Agreement sets forth expectations and guidelines for the remote viewing of materials from the ███
██████████████████████. Researchers accessing archival materials digitally must review and sign this *Access & User Agreement.*

In this document, the term "remote" or "remotely" refers to electronic viewing of materials not publicly available via computer and/or smart device.

I. General Access

1. Digital materials will be shared remotely via a platform of ███'s choosing (Vimeo, Drop Box, Google Drive, Email, etc...)

2. Preparation is important. Conscious respect and sensitivity toward materials is a priority. Please prepare yourself to work with cultural heritage materials by having an open mind and positive attitude.

3. Materials may need to be processed by ███ staff in order to make them available for remote viewing and research. Therefore researchers may be asked to pay a fee for such processing.

4. All archival materials authorized for remote access are confidential and private. Researchers will not share links, folders, passwords and/or duplicate any of those materials.

5. Researchers will be asked to provide feedback on their experience via an anonymous follow up survey *(link will be emailed)*.

6. ███ encourages the equitable use of the collections without discrimination or preferential treatment.

7. ███ reserves the right to limit access or cease service to an individual who has demonstrated carelessness, endangered the privacy of individulas, and/ or has violated any part of this agreement.

II. Limitations on Access

1. In some situations, ███ has a legal, ethical, or other obligation to restrict access to parts of collections. Should there be any restrictions, the staff will inform researchers of the conditions governing access to certain parts of collections. Donors are allowed to access collections that they have donated and restricted. They may also grant access to immediate family members with notice to ███. However, they may not grant access to non-immediate family members or others. If the donor is no longer living, researchers must contact the family of that donor to for permission to access restricted materials.

2. Unprocessed archival collections are generally considered closed for research. Although, requests for access to unprocessed archival materials can be made to staff who will review the inquiry with the Executive Director. It should be noted that there could be issues that arise in requesting these types of materials such as donor restrictions, material fragility, or confidentiality concerns that may prevent access. Additionally, there may be a delay in access as staff search for and assess unprocessed materials.

III. Terms of Use

1. To request use of materials from the ███████ for citation in academic work, printing of educational outreach materials, or publishing submit an *Application For Use of Materials* form. You may request this form by emailing ████████████████████ staff may ask you to clarify or provide further information about your request. **NOTE:** You may not use any materials in any works without written permission from ███.

2. ███ does not hold the copyright to some materials within our collections. Accordingly, it is the sole responsibility of the researcher to determine the copyright status of such materials, investigate owner of the copyright, and obtain permission for the intended use. The researcher will be responsible for any legal claims that may arise from your unauthorized use of copyrighted materials.

3. ███ will provide a single copy of a material for free if the material is for educational, academic or personal use (family research, thesis paper, class assignment, etc...). Duplicates requested for commercial use (i.e. television, film, magazine publishing, etc...) will incur a fee for use, staff time, and processing. Duplicates will be made in accordance with organizational procedures and consideration for physical preservation. Inquiries about video or audio duplication will be handled on a case-by-case basis with specialized agreements.

4. When citing content from the ███████, researchers must use ████████████ followed by the Collection and/or Sub-Collection name (i.e. ███████████████████████). If the material is copyrighted by another party, the researcher/ user must cite the appropriate source and comply with other terms or restrictions allocated by the copyright owner. Please ask the ███ staff to assist in clarifying citation information.

IV. Confidentiality Mandate

███ has a responsibility to protect the character, physical and emotional state, and reputation of any and all peoples that are part of ███. The researcher recognizes, understands, and agrees that any access to private materials (i.e. private family matters, gossip) and/or personal data (i.e. addresses or phone numbers) disclosed shall remain confidential. All such information shall be held in the strictest confidence, and the researcher shall not share, sell, transfer, copy, duplicate or make available, verbally, by electronic transmission, or in any other form or manner of communication, any materials, information, and/or data that is private and confidential to any other persons, groups, firms, social media sites or entities unless a formal agreement is established between the researcher and ███.

██████

Email: ██████ Phone: (██████

Access & Use Agreement

██████ believes in the upmost respect for the integrity of our elders and community members who have entrusted materials to us. We ask all researchers to abide by the terms set forth in this document and conduct themselves with an attitude of courtesy and sensitivity towards materials and staff.

Print Name ██████ █ ██████ _____

Address ████████████████████_____

Cont█ █████████ █████████████ █ ██ █ ██

I have read, understand and agree to abide by the terms in this <u>Access and Use Terms</u> of the ██████ ████

Signature ████████████_____ Date ██████_____

FOR ██ *STAFF ONLY*
Visits (material viewed, date, staff initials)

Appendix J: Copyright Clearance Center Permission

Copyright
Clearance
Center

Back to view orders

Copy order

Print this page
Print terms & conditions
Print citation information
(What's this?)

Confirmation Number: 11767723
Order Date: 11/23/2018

Customer Information

Customer: Lynn Melena
Account Number: 3001370528
Organization: Lynn Melena
Email: lynn.melena@waldenu.edu
Phone: +1 (720) 231-3980

Search order details by: Choose One ⇅   Go

This is not an invoice

Order Details

PARTICIPATORY CREATIVITY

Billing Status:
Charged to Credit Card

Order detail ID: 71674215	**Permission Status:** ✅ Granted
ISBN/ISSN: 9781315671512	**Permission type:** Photocopy for general business or academic use
Publisher: Routledge	**Article/Chapter:** Chapter 8 Figures
Your line item reference: Request for Figures 8.1 thru 8.4	**Total number of pages:** 5
	Number of copies: 1
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Copy

$ 33.50
($33.50 per student)

Total order items: 1	**Order Total: $33.50**