

# Walden University

College of Education and Human Sciences

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Walden University  
2024

Abstract

Educators' Perceptions of the Implementation and Influence of the Middle School

Concept

by

Carri Wappat Burns

MA, Wheelock College, 2003

BS, Wheelock College, 2000

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Education

Walden University

August 2024

## Abstract

The problem addressed in this study was that teachers struggle to apply the middle school concept in three middle schools in the U.S. region of New England. This study was a qualitative investigation of teachers' perceptions of the middle school concept and their needs for additional support to effectively apply it. The conceptual framework for this study was the middle school concept itself, which theorizes five essential attributes of effective middle schools: responsive, challenging, empowering, equitable, and engaging. The research questions were about teachers' perceptions of their knowledge about and application of the middle school concept, the extent to which the middle school concept is being applied, and the recommendations regarding the professional development and support needed for applying the middle school concept. Face-to-face, semi-structured interviews were conducted with 15 teachers from three middle schools in the target district. Data analysis involved open and axial coding and thematic analysis. Five main themes emerged from the study, indicating that participants recognized the unique developmental needs of middle school students, emphasizing the importance of teaming, and revealing that successful implementation of the middle school concept requires addressing teacher resistance, navigating school policies and practices, and providing robust leadership and ongoing professional development. This study may contribute to positive social change by helping policymakers, educators, and administrators better understand teachers' perceptions of the middle school concept, ultimately aiming to improve middle level education.

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## Dedication

I have always loved learning. My mom once described this love as "wide-eyed wonder," and my dad always told me that I could do anything. With their support and love, I moved through life stubbornly curious. At the age of 8, I knew I wanted to be a teacher. Being a teacher is who I am, and I thrive on learning.

I am so incredibly grateful that I found a partner who learns alongside me as we continually discover the wonders of devotion. I hope our children inherit our passion for continuous learning and remain endlessly curious.

This dissertation is dedicated to 3-year-old me, who knew the value of learning before she was even old enough to go to school. It is dedicated to 18- and 22-year-old me, who made the dream of teaching a reality; to 29-year-old me, who first embarked on this doctoral journey; and to 88-year-old me, who better still be learning.

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I would first like to acknowledge and pay tribute to Wheelock College, whose profound commitment to improving the lives of children and families has deeply influenced my academic and professional journey. The values instilled by Wheelock's mission will forever guide my dedication to teaching and learning.

I am immensely grateful to Mrs. Wagner, my favorite teacher, whose influence during my early educational years has left an indelible mark on my journey. Additionally, I am thankful for the guidance and mentorship I have received from numerous mentors throughout my teaching career. Their wisdom and support have shaped my professional growth and passion for education. I am deeply thankful for the unwavering support and guidance from FC. Your professional influence and friendship mean more than any words could ever capture.

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I am profoundly grateful to the participants of this study whose willingness to share their experiences and insights made this research possible. Their contributions have enriched the findings and will undoubtedly have a meaningful impact on middle-level education.

I would like to acknowledge all the students I have taught over the years. They have inspired me with their curiosity, resilience, and passion for learning. I hope I have

inspired them to pursue their dreams and continue their educational journeys with confidence and dedication.

I want to express my deep gratitude to my faithful canine companions, whose presence provided comfort and joy during the long hours of writing and research.

Finally, I am deeply grateful for my family's unwavering encouragement throughout this journey. My husband has been a constant source of support and partnership. I embarked on this path when we had only one child. As our family grew to include two more children, I realized the preciousness of their young years and made the wise decision to pause my work to cherish those moments. Now, as they navigate their teenage years and our interactions evolve, I am grateful for their understanding and encouragement. Nate, Piper, Cole, and Oscar, you are everything.

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## Chapter 1: Introduction to the Study

Middle-level educators are challenged to provide students with a developmentally and culturally responsive education during a period of development where adolescents are experiencing profound change ranging from physical and intellectual change to moral and social-emotional change (Bishop & Harrison, 2021). The Association of Middle Level Education (AMLE) noted five essential attributes of successful middle schools: responsive, challenging, empowering, equitable, and engaging (Bishop & Harrison, 2021). Implementation of these essential attributes, along with structures and best practices associated with culture and community; curriculum, instruction, and assessment; and leadership and organization, are characteristics of successful middle schools.

In this study, I explored how middle-level educators implement the middle school concept. I based teacher perceptions of their implementation of the essential attributes of successful middle schools as defined by AMLE (Bishop & Harrison, 2021). By analyzing teachers' perceptions, I was able to understand how teachers' perceptions of the middle school concept affect their implementation of it. I was also able to understand what additional support teachers need to effectively apply the middle school concept. Chapter 1 includes background information, along with the problem and purpose statements; research questions (RQs); and discussion of the conceptual framework, nature of the study, assumptions, scope and delimitations, limitations, and significance of the study. Key terms are also defined.

## **Background**

Middle schools in the United States are educational settings designed for young adolescents, typically in Grades 5 through 8. However, any makeup of these grade levels would fall under the description of a middle school. Middle-level educators are tasked with providing developmentally appropriate educational experiences for young adolescents. The concept of middle schools began in 1963 when Alexander, a Dewey protégé, stated that it was necessary for educators to consider adolescent development in designing the education of adolescents, putting students, rather than the curriculum or teachers, at the center (Alexander, 1968; Edwards et al., 2014). Alexander (1963, 1964) stated that the transitional nature of the junior high school model was not meeting the developmental needs of young adolescents and that a middle school that was neither a bridge from elementary nor preparation for high school was necessary for meeting the various needs of middle-level students. The concept of middle school was established by considering the profound biological, cognitive, psychosocial, and emotional changes that occur during adolescence (Alexander, 1964). Successful middle schools maintain a culture responsive to these changes through developmentally appropriate practices and structures (Alexander, 1964; Alverson et al., 2019; Bishop & Harrison, 2021; Jackson et al., 2000; Olofson & Knight, 2018).

The essential attributes of successful middle schools include being responsive, challenging, empowering, equitable, and engaging (Bishop & Harrison, 2021). AMLE's middle school philosophy suggests that it is these essential attributes working in concert that determine a successful middle school, and without all attributes, middle schools are

unsuccessful in meeting the needs of young adolescents (Bishop & Harrison, 2021).

According to Jackson et al. (2000), the middle school concept is a system that must be implemented with fidelity to ensure success.

Turning Points (Carnegie Council on Adolescent Development, 1989) and Turning Points 2000 (Jackson et al., 2000) express the importance of the middle school concept through seven design elements that align with AMLE's essential attributes. The vision expressed in these elements emphasizes high expectations for students' intellectual development (Jackson et al., 2000). The Turning Points 2000 vision calls for equitable and responsive instruction to adolescent development, a challenging curriculum, and smaller team settings within larger schools to build relationships between teachers and students to empower students to become lifelong learners (Jackson et al., 2000).

AMLE's five essential attributes of effective middle schools describe how effective middle schools should respond to the varying needs of young adolescents (Bishop & Harrison, 2021). Structures such as interdisciplinary teaming and common planning time for teachers, student-centered instruction, flexible grouping and scheduling, and the presence of an advisory course are characteristics of the middle school model (Alverson et al., 2019; Edwards et al., 2014; Jackson et al., 2000; Olofson & Knight, 2018). In addition to these structures, the middle school concept also focuses on the development of culture and community, along with responsive curriculum, instruction, assessment, and leadership (Bishop & Harrison, 2021; Jackson et al., 2000). In this study, I explored teachers' perceptions of the middle school concept and the extent of its application in the Woodland School District (pseudonym; WSD).

Alexander's (1964, 1995) theorizing on middle schools served as a foundation for both the Turning Points vision (Jackson et al., 2000) and AMLE's (Bishop & Harrison, 2021) essential attributes and characteristics. Alexander (1964) asserted that successful learning occurs when teachers have the resources they need to create an environment where students are engaged in learning. The most successful middle schools embrace middle school philosophy through interdisciplinary teaming and responsive teaching focused on social–emotional development and real-world learning experiences that engage young adolescents (Alverson et al., 2019; Edwards et al., 2014; Olofson & Knight, 2018).

Chapter 2's review of the literature shows that implementation of all essential attributes of the middle school concept collectively yield successful middle schools. However, a gap in practice existed between the essential attributes of successful middle schools and what middle school leaders choose to implement. I examined teachers' perceptions of the middle school concept by conducting semistructured interviews. The interviews provided information on the middle school concept and the state of middle-level education in the WSD.

### **Problem Statement**

The problem addressed in this study was that the teachers at WSD's three middle schools struggle to apply the middle school concept, an educational approach that is developmentally responsive to meeting the educational and developmental needs of young adolescents. Leaders of this urban district in New England developed a strategic plan for 2019 to 2024, which included a goal to cultivate a safe and nurturing learning



and working environment. Two subcategories of this goal were (a) to prioritize the work of the middle school steering committee to research, identify, and implement best practices in middle school philosophy and (b) to design and implement professional development (PD) opportunities for middle school staff on middle school best practices. Woodland middle schools transitioned from junior high schools in 2003. Changes in leadership and a lack of PD prevented the schools from fully adopting the middle school concept at that time and throughout the next 20 years.

According to the WSD middle-level education policy, the components of middle-level education include an emphasis on a student-centered program, development of effective learning communities, interdisciplinary planning, block scheduling, and leveling of students for instructional purposes (homogeneous grouping). The establishment small group student/teacher relationships, parents as active partners, accountability, and program evaluation are other components. The only aspect of this policy consistent across the three middle schools under study was the leveling of students for instructional purposes.

During the 2022–2023 school year, the WSD Middle School Steering Committee reformed. These monthly meetings focused on necessary improvements in the middle school concept in the WSD. The work began with members reviewing articles on middle-level education, and committee members discussed the research compared to current practices in the WSD to establish consensus on a vision of middle school beliefs and best practices. According to a committee member, discussion throughout this first meeting indicated that committee members felt that although some structures were in place in the

three middle schools in the WSD, a significant shift would need to be made to change the current mindset of middle-level educators. In addition, effective PD would need to be provided to support this shift. Subsequent committee meetings focused on examining the leveling policy and flexible grouping and the creation of a one-pager and a survey to be shared by the building principals and their middle school steering committee members to their respective staff. Discussions on leveling and flexible grouping were intense but productive, as this will be the third time since 2003 that recommendations to change the leveling policy went before the school board.

The middle school steering committee meetings during the 2022–2023 school year indicated that the middle schools under study did not currently practice the middle school concept in its entirety. Notes from the discussions indicated a need for more understanding of what it means to be a middle school, and committee members continually asked for help in developing their pedagogy to better meet the needs of the students before them. Targeted PD on the middle school concept, combined with the district's goal to prioritize the work of the middle school steering committee to research, identify, and implement best practices in middle school philosophy and to design and implement PD opportunities for middle school staff on middle school best practices, is indicative of a local problem with middle-level education.

### **Purpose of the Study**

The purpose of this qualitative study was to explore teachers' perceptions of the middle school concept and their needs for additional support with applying it in the three middle schools in the WSD. In this study, I identified the challenges the three schools

face in adopting the middle school concept. The results from this study were used to identify trends in teachers' perceptions of the middle school concept. By gathering teacher input, I identified gaps that may occur in developing schools that meet AMLE's criteria for successful middle schools. I examined current research on effective middle schools. Then, I conducted face-to-face, semistructured interviews of WSD teachers to understand their perceptions of their knowledge and use of the middle school concept. The essential attributes of successful middle schools include being responsive, challenging, empowering, equitable, and engaging (Bishop & Harrison, 2021). Based on the analysis of participating teachers' perceptions of these attributes, I determined the supports needed for teachers to implement the middle school concept with fidelity. Ultimately, this study may influence PD for middle-level educators in the implementation of the middle school concept.

According to Merriam and Tisdell (2016), researchers who conduct basic qualitative studies focus on the meanings people have given to a central issue. The central aim of this qualitative study was to explore and understand teachers' perceptions of the middle school concept and its implementation in their schools, to discover the underlying challenges of implementing the middle school concept. Leaders of the district under study aimed to prioritize work at the middle level to implement best practices in middle school philosophy. This study addressed the gap between what teachers perceive to be best practices that support the middle school concept and what the tenets of the concept include. Middle-level educators may be able to use the findings of this study to guide their implementation of best practices that support the middle school concept.

### **Research Questions**

Researchers have extensively examined the middle school concept and PD. There is little research on how middle-level educators perceive their knowledge and application of the middle school concept or the PD needed to support them. The purpose of this qualitative study was to explore teachers' perceptions of the middle school concept and their needs for additional support with applying it in the three middle schools in the WSD. This study was underpinned by the following RQs:

RQ1: What are teachers' perceptions of their knowledge about and application of the middle school concept in the middle schools in the WSD?

RQ2: What are teachers' perceptions of the extent to which the middle school concept is being applied in the middle schools in the WSD?

RQ3: What are teachers' recommendations about the PD and support needed for applying the middle school concept in the WSD?

### **Conceptual Framework**

The conceptual framework for this study was the middle school concept (also referred to as "middle school philosophy"), which was based upon AMLE's research (Bishop & Harrison, 2021). Middle-level educators are tasked with providing developmentally appropriate educational experiences for young adolescents. The middle school concept provides a framework for student-centered education that responds to the unique developmental needs of adolescents (Bishop & Harrison, 2021; National Middle School Association, 2010). According to AMLE, formerly the National Middle School Association, the essential attributes of successful middle schools must be responsive,

challenging, empowering, equitable, and engaging (Bishop & Harrison, 2021). AMLE's concept of middle school philosophy suggests that it is the essential attributes working in concert that determine a successful middle school, and without all attributes, middle schools will be unsuccessful in meeting the needs of young adolescents (Bishop & Harrison, 2021). According to Jackson et al. (2000), the middle school concept is a system that must be implemented with fidelity to ensure success. AMLE's five essential attributes of effective middle schools describe how middle schools should respond to the varying needs of young adolescents (Bishop & Harrison, 2021). Structures such as interdisciplinary teaming and common planning time for teachers, student-centered instruction, flexible grouping and scheduling, and the presence of an advisory course are characteristics of the middle school model (Alverson et al., 2019; Edwards et al., 2014; Jackson et al., 2000; Olofson & Knight, 2018).

In addition to these structures, the middle school concept also focuses on the development of culture and community, along with responsive curriculum, instruction, assessment, and leadership (Bishop & Harrison, 2021; Jackson et al., 2000). I used this framework, along with analytical memos, categories, thematic analysis, and open coding, to guide my data collection and analysis. By using the middle school concept framework, I was able to operationalize the research problem by having the participants identify and explore how the tenets of the middle school concept are practiced in their schools.

### **Nature of the Study**

I used qualitative methods to obtain an in-depth understanding of the middle school concept. I conducted individual interviews with teachers in a city in New England.

The three schools in which the teachers worked serve students in sixth through eighth grade. The participants in this study were teachers who have had experience teaching at the middle school level. I created interview questions to focus on participants' perceptions of the middle school concept and the extent to which it is used in their schools. The questions were open-ended, and I transcribed interview data for analysis (see Burkholder et al., 2020). Participant permission was obtained to record interviews using a digital recording device. I then transcribed and coded information for data analysis, sorting data to identify themes.

### **Definitions**

To understand educators' perceptions of and their needs for additional support with applying the middle school concept, the following terms are defined to facilitate a shared understanding of their meanings and significance in the study:

*Advisory:* Scheduled time during the school day in middle school where each school student has one adult who works with them to mentor and support their social emotional and academic needs (Bishop & Harrison, 2021).

*Culturally responsive teaching:* An approach to education that features respect for and use of students' cultural backgrounds to provide effective classroom instruction (Will & Najarro, 2022).

*Flexible grouping:* A technique in which students are organized intentionally for differentiated instruction over short periods of time (Doubet, 2022).

*Leveling:* The homogeneous grouping of students at instructional levels based on achievement (White, 2021).

*Middle school:* Any school that responsively instructs young adolescents, often in Grades 5 through 8 (Bishop et al., 2021).

*Middle school concept:* An educational approach that is responsive to meeting the educational and developmental needs of young adolescents (Alexander, 1963, 1964; Bishop et al., 2021).

*Pedagogy:* Methods educators use to teach in response to students' needs (Will & Najarro, 2022).

*Professional development (PD):* Professional learning geared towards educators such as teachers and administrators to improve their pedagogy (Great Schools Partnership, 2013).

*Research-based best practices:* Instructional practices with widely agreed upon effectiveness in teaching that are generalizable and support equitable outcomes for all students (Simms, 2024).

### **Assumptions**

In this study, I assumed that participants would provide honest responses. This assumption is meaningful to the study because the data collected encompassed participating teachers' perceptions of (a) their application of the middle school concept and (b) their needs for additional support. It was also assumed that participants will have some understanding of the middle school concept. This assumption is important because participating teachers with limited experience with the middle school concept might provide limited information. It was further assumed that participants would understand the RQs and would feel comfortable responding to and asking clarifying questions.

### **Scope and Delimitations**

The scope of this study was limited to middle-level education teachers across three middle schools in an urban district in New England. Participant selection was limited to sixth- through eighth-grade teachers across all content areas, including unified arts, intervention, and special education. I used purposeful sampling to select 15 teachers to participate in the study.

### **Limitations**

Limitations occur in qualitative research. Trustworthiness or internal validity increases when researchers are aware of limitations (Burkholder et al., 2020). Because the focus of this study was on teacher perceptions, identifying limitations increased the trustworthiness of this research (see Burkholder et al., 2020). Due to my position as an instructional coach, participants may have perceived me to be a person of power and may have provided answers they thought I wanted to hear (see Burkholder et al., 2020). It was necessary that I explain the purpose of my research and the need for honest responses (see Burkholder et al., 2020). Researcher bias is another potential limitation. To reduce bias, I took care when reviewing, recording, and coding data so as not to impose my thoughts and perceptions.

Additional limitations include participant variables. Although all the teachers in this study were middle-level educators, each participant had varying degrees of experience with the middle school concept, including years of experience teaching and different forms of teacher preparation. Another limitation of this study relates to the transferability of the findings. Leaders of middle schools with demographics and settings



that differ from the district under study may not find the results of this study applicable to their schools.

### **Significance**

The purpose of this qualitative study was to explore WSD middle school teachers' perceptions of the middle school concept and their needs for additional support to apply it. Semistructured interviews were used to ascertain participating teachers' perceptions. The middle school concept focuses on providing young adolescents with responsive, challenging, empowering, equitable, and engaging educational experiences (Bishop & Harrison, 2021). This study may reveal a gap in what middle-level educators perceive as the middle school concept and what it is, as well as between current practices in the middle schools under study and best practices in middle-level education. By conducting this study, I aimed to determine these gaps and identify PD opportunities to best support middle-level educators in providing their students with a developmentally appropriate education.

### **Summary**

The middle school concept is unique to the developmental and cultural needs of young adolescents. The central aim of this qualitative study was to explore and understand teachers' perceptions of the middle school concept and its implementation in their schools, to discover the underlying challenges of implementing the middle school concept. I conducted this study to help middle-level educators better understand the middle school concept and determine PD that would support middle school philosophy. The RQs in this study address teachers' perceptions of the middle school concept and

their needs for support with applying it. Participants shared their experiences and perceptions of the challenges of the middle school concept in face-to-face, semistructured interviews. In Chapter 2, I further discuss the conceptual framework of the study, the middle school concept, and I review key literature related to the study topic.

## Chapter 2: Literature Review

AMLE has established a framework for successful practice in middle schools. In this framework, middle-level education must be responsive, challenging, empowering, equitable, and engaging (Bishop & Harrison, 2021). The purpose of this qualitative study is to explore teachers' perceptions of the middle school concept and their needs for additional support with applying it. Following this framework with fidelity, as all aspects of the middle school concept are interdependent, school communities can build successful middle schools (Bishop & Harrison, 2021).

In the literature review, I identify the components of the middle school concept and best practices associated with successful middle schools. I used current literature to establish the relevance of the middle school concept. The literature review begins with the conceptual framework and developmentally and culturally responsive middle-level practices based on AMLE's framework. In Chapter 2 I also describe components for effective middle-level education. These components include climate and culture; curriculum, assessment, and instruction; and organization. The literature review also includes current data of schools implementing varying aspects of the middle school concept.

### **Literature Search Strategy**

This literature review synthesizes current research published in the last 5 years pertaining to the middle school concept. This literature review includes discussion of climate and culture; curriculum, assessment, and instruction; and organization, among other topics. Walden University's library databases, such as ERIC, ProQuest Education

Database , EBSCOhost, Education Research Complete, PsycARTICLES, and Sage Education Journals were accessed to obtain research. Various sources, including peer-reviewed journal articles, books, and dissertations, were examined. The key search terms included *educational philosophy; philosophy of education; middle school philosophy; middle school concept; educational tenets; middle school; junior high; teacher perceptions; adolescent development; culturally responsive education; curriculum, instruction, and assessment; preservice teacher programs; and effective middle-level practices*. These databases provided peer-reviewed articles relevant to the RQs for the study. I continued to search for literature until themes became repetitive.

### **Conceptual Framework/Theoretical Foundation**

The conceptual framework of this study was used to address the beliefs, assumptions, theories, and expectations that support the research. The conceptual framework of this study is the middle school concept, based upon the research of the AMLE (Bishop & Harrison, 2021). According to AMLE, effective middle schools move away from being schools that simply prepare students for high school, towards developmentally and culturally appropriate practices that are equitable, empowering, challenging, and engaging (Bishop & Harrison, 2021). Therefore, middle-level educators need to understand AMLE's tenets of successful middles schools and implement them with fidelity. According to AMLE, the middle school concept provides a framework for student-centered education that responds to the unique developmental needs of adolescents (Bishop & Harrison, 2021).

Because this study is focused on teacher's perceptions of AMLE's middle school concept, a systemic approach to the education of young adolescents, the tenets of successful middle schools will contribute to this study. Based on these tenets, I relied on the RQs of this study to gather information on teachers' perceptions of the middle school concept and their need for additional support with applying it in their practice. A gap in practice exists between AMLE's tenets of successful middle schools and what is currently being conducted in the WSD. I have provided a literature review related to the RQs. Based on the RQs, I have determined why the middle school concept was meaningful to the study.

### **Literature Review Related to Key Concepts and Variables**

#### **Developmentally and Culturally Responsive Middle-Level Practices**

An underlying theme in the middle school concept is that to ensure success for all students, middle-level education must be developmentally and culturally responsive (Bishop & Harrison, 2021). All aspects of the learning environment must be structured to support adolescent development and diversity. Rheume et al. (2021) concluded that middle-level educators and leaders best support students by considering all aspects of their development when making decisions. In addition to developmental needs, an emphasis must be placed on culturally responsive practices to meet the needs of every adolescent learner (Shockley et al., 2020). Thus, educators must be knowledgeable in adolescent development and culturally responsive teaching practices, and all decisions must be made with these attributes in mind (Bishop & Harrison, 2021). The following

sections of this literature review address developmental and cultural responsiveness and other specific areas of middle-level practices.

### **Climate and Culture**

A positive climate and culture are vital to successful middle schools. As noted earlier, successful middle schools emphasize students' intellectual development (Bishop & Harrison, 2021). To reach this goal, it is necessary that the middle school community shares this vision. AMLE suggests that for a middle school to succeed, teachers must value and respect their students and ensure that all students feel safe and are a valuable part of the community (Bishop & Harrison, 2021). In a study by Alverson et al. (2021), 96% of teachers and administrators indicated that welcoming and supportive environments are very important. Additional research by Rheaume (2022) also aligns with this vision, with 95% of participants rating "educators who value working with young adolescents" as very important (p. 5).

To maintain an environment where students feel valued, emphasis is placed on middle school teachers building strong relationships with students and families (Bishop & Harrison, 2021). When building relationships, educators must consider students' developmental stage and their cultures and identities (Bishop & Harrison, 2021). Scales et al. (2020) studied the effects of developmental relationships between middle school teachers and students and found that students with better relationships with their teachers were more successful. This research indicated that success was due to increased motivation and engagement due to positive relationships (Scales et al., 2020). In a qualitative survey study, Ruppert (2020) sought to explore answers to the question,

"What drives your spirit and commitment to middle-level education?" (p.42). Ruppert (2020) uncovered five mindsets focused on collaboration, commitment, and joy that support the need for building strong relationships between middle school teachers and students and the ability to learn from each other.

A typical structure in middle schools that supports building relationships is through the implementation of an advisory program. In an advisory program, each student has one adult advisor who works specifically with them to support their intellectual development and social and emotional well-being (Bishop & Harrison, 2021; George & Alexander, 2003; Jackson et al., 2000). Advisory programs are also an opportunity to create affirming spaces for all students, including students who are culturally and linguistically diverse and/or lesbian, gay, bisexual, transgender, queer/questioning, plus (others) (Bishop & Harrison, 2021). In a survey study by Alverson et al. (2021), the existence of an advisory program within their schools was reported by about 70% of respondents. In a comparative study by Rheaume (2022), advisory programs were also highly valued by many respondents. Implementing effective advisory periods requires purposeful planning, including flexible scheduling and grouping, as discussed earlier, along with ongoing PD for teachers to support them in their advisor role (Bishop & Harrison, 2021). With a clear goal and ongoing PD, the advisory period can effectively address the social–emotional needs of young adolescents (Balme, 2022; Woods et al., 2020). Research indicates that although advisory programs are present in schools, the time is often focused on academics or homeroom activities rather than students' social–emotional needs (Rheaume, 2022; Woods et al., 2020).

Valuing students' identities is paramount in effective middle schools (Bishop & Harrison, 2021). Student identity is impacted by collaborative teaching and learning practices (Dasgupta et al., 2022; Main et al., 2023). Dasgupta et al. (2022) found that when students perceived the climate of their classroom to be communal, they had a greater sense of belonging and a more positive self-concept towards mathematical learning. A sense of belonging is critical to positive identity formation (Andrews, 2023). Despite this, many middle schools continue practices that negatively impact students' identity formation. Alverson et al. (2021) noted that, despite the research to the contrary, many middle school educators make use of structures like ability grouping. Ability grouping often negatively affects students' sense of self, research shows (Fleischmann et al., 2021; Tunç & Ülker, 2020). Zysberg and Schwabsky (2020) studied the relationship between school climate and academic achievement, concluding that positive relationships and a sense of belonging leads to student self-efficacy and increases student success. Smith et al. (2020) explored the effects of school climate on students' identity formation. Their findings suggest that a positive school climate including factors such student voice and choice in learning as well as parental involvement have a significant effect on students' sense of self (Smith et al., 2020).

Effective middle schools value and engage families (Bishop & Harrison, 2021). Research shows that although educators value relationships with families, these relationships are regularly fostered about half the time (Alverson et al., 2020). Additional research indicates that positive communication between school and home impacts student success (Berryhill et al., 2020; Pestaner et al., 2023; VanValkenburgh et al., 2021). Smith



et al. (2020) suggest that parental involvement in school also positively impacts students' sense of self, which directly affects students' success in school. In a qualitative study, Henderson et al. (2020) explored the impact of home-school relationships. They found that values, beliefs, and behavioral expectations often hinder successful partnerships between schools and families. Research suggests that clear communication that engages schools and families in discussing the differences and similarities in teacher and parent expectations can foster positive parental involvement (Pestaner et al., 2023; VanValkenburgh et al., 2021). Effective middle schools work to break down barriers by engaging with families to learn more about their values and cultural backgrounds (Bishop & Harrison, 2021).

A safe and healthy environment in a middle school setting also honors young adolescents' developmental growth and cultural identity (Bishop & Harrison, 2021; George & Alexander, 2003; Jackson et al., 2000). Research (Alverson et al., 2021; Jansen & Kiefer, 2020; Rheume, 2022) shows that educators recognize the need for developmentally responsive middle schools. Data from a survey study conducted by Alverson et al. (2020) indicates that while educators may value developmentally responsive practices, there remains a disconnect between these beliefs and their implementation. Smith et al. (2020) recognized through their research that the developmental needs of high schoolers and middle schoolers were different. For example, their research indicated that middle school students were more driven to identify with others than high school students and that schools must be tailored to the developmental needs of the students (Smith et al., 2020).

Bishop and Harrison (2021) state that middle school students are more successful when teachers are trained in developmentally appropriate strategies. The middle school concept calls for educators trained to work specifically with young adolescents (Bishop & Harrison, 2021; Jackson et al., 2000). Wall's (2021) study of 22 middle school teacher candidates focused on the preservice teachers' vision statement and reflection from their field experiences. Results of the study indicated that all teachers prioritized the need for developmentally responsive learning environments and practices (Wall, 2021). On the other hand, Perry et al. (2021) found that preservice middle school teachers often lack a clear understanding of adolescent development, leading teachers towards a deficit mindset of middle school students and an overly concerned mindset about classroom management.

Culturally responsive education supports students' cultural identities while considering the cultural identities of others and the societal impacts of culture (Muhammad, 2020). In addition, culturally responsive teaching practices create safe and healthy school environments (Bishop & Harrison, 2021). Andrews (2023) argues that organization structures of middle schools such as de-tracking, teaming, and flexible scheduling support culturally responsive pedagogies. Research indicates that organizational structures such as tracking are not always considered detrimental to equity (Alverson et al., 2021). On the other hand, Shockley et al. (2020) conducted research in culturally relevant pedagogies to identify effective teaching strategies in middle school STEM classes. Their research indicates that when culturally relevant pedagogies are used, instruction and learning improve for both teachers and students (Shockley et al.,

2020). Parkhouse et al. (2023) explored how teachers develop cultural responsiveness, finding that teachers improved through raising their consciousness, consciousness and relationship building, knowledge and practice building, and practice refining. PD in improving cultural responsiveness in education is a necessary part of the requirement of specially trained educators at the middle level (Bishop & Harrison, 2021; Parkhouse et al., 2023).

Middle-level teachers often feel unprepared to teach in urban settings and lack training to develop culturally responsive pedagogies (DeMink-Carthew et al., 2023; Kratz & Davis, 2022). Research conducted by Jackson and Delaney (2020) explored how a colorblind mindset impacts teacher instruction, concluding that a shift towards cultural responsiveness is necessary to effectively provide equitable instruction for all students. Smith et al. (2020) provide evidence for using communal practices in classrooms to support all students, specifically indicating the positive impact a sense of belonging has on Black, Latinx, and Native American students. Busey and Gainer (2021) examined the colorblindness in AMLE's *This We Believe*, concluding that cultural responsiveness must become a critical component of the middle school concept. The 2021 revision of *This We Believe* included additions pertaining to building community that acknowledge prejudices present in schools and working to establish inclusive climates where all members of the school community feel welcomed and acknowledged (Bishop & Harrison, 2021).

The revisions to AMLE's essential attributes of successful middle schools indicate a shift from equity as every student's right to learn towards a culturally

responsive mindset for socially just learning opportunities (Bishop & Harrison, 2021; DeMink-Carthew et al., 2023; Díaz, 2023; Falbe & Smith, 2022; Moulton, 2023). Díaz (2023) calls for middle-level educators to explore their cognitive dissonance to develop culturally relevant pedagogies that are responsive to the students they teach. Andrews and Leonard's (2023) phenomenological study of 20 middle level teacher candidates explored noticing and responding to patterns of injustice. In their collective self-study, Falbe and Smith (2022) explored anti-racists mindsets and harmful systemic structures in middle-level education practices. Culturally responsive education that promotes equity is particularly powerful for early adolescents and a crucial component in middle-level education (DeMink-Carthew & Gonell, 2022). The results of these studies support AMLE's call for educators who are specially trained to teach young adolescents as well as equity-oriented and responsive teacher education (Andrews & Leonard, 2023; Bishop & Harrison, 2021; DeMink-Carthew & Gonell, 2022; Falbe & Smith, 2022).

The climate and culture of effective middle schools is also impacted by how decisions are made (Bishop & Harrison, 2021). Decision-making in effective middle schools is collaborative and supports the positive relationships at the heart of the middle school concept (Bishop & Harrison, 2021; Jackson et al., 2000). In a study on the effects of developmental relationships between teachers and students, researchers determined that sharing power with students contributed to student success (Scales et al., 2020; Walls, 2021). Shared leadership is important between teacher and student and between administration and teachers (Jackson et al., 2000). A correlational, quantitative study by Demarco & Gutmore (2021) found that school leaders focused on distributive leadership

to create a more successful school climate and culture. One characteristic concerning leadership suggested by AMLE is that "leaders demonstrate courage and collaboration" (Bishop & Harrison, 2021, p. 48). Research (Demarco & Gutmore, 2021; Ruppert, 2020; Scales et al., 2020; Walls, 2021) suggests that distributive leadership between administrators, teachers, and students and collaborative decision-making leads to effective middle schools. Additionally, equity must be at the center of all work in middle schools (Busey & Gainer, 2021). When all decisions are made with middle school students' developmental and cultural needs in mind, schools are more successful (Busey & Gainer, 2021; Rheume, 2022).

### **Curriculum, Instruction, and Assessment**

Hallmarks of the middle school concept include a diverse and rigorous curriculum, varied and ongoing feedback, and developmentally appropriate and culturally responsive instruction (Bishop & Harrison, 2021; George & Alexander, 2003; Harrison et al., 2019; Jackson et al., 2000). A set of standards that indicate what students must know and be able to do is necessary to develop effective curricula (Jackson et al., 2000). Jackson et al. (2000) claim that standards promote "excellence and equity" and were a part of the middle school movement prior to the Common Core State Standards Initiative to create common, rigorous standards in all grade levels nearly a decade later (p. 33). Believing that all students can meet high standards was a component of the middle school concept when the middle school movement began and remains a crucial component today (Bishop & Harrison, 2021; Jackson et al., 2000). In addition to high academic standards, the curriculum must reflect and include the voices of marginalized groups (Jackson &

Delaney, 2020; Shargel, 2022; Shockley et al., 2020). Along with the developmentally and culturally responsive curriculum, assessment of learning must also be developmentally and culturally appropriate for young adolescents, connected to the standards used to design the curriculum, and designed so students can apply what they learned to any context (Shockley et al., 2020; Jackson & Delaney, 2020).

AMLE suggests that for students to be successful, the middle school curriculum must be "challenging, exploratory, integrative, and diverse" (Bishop & Harrison, 2021, p. 27). In a study by Alverson et al. (2021), 91% of teachers supported AMLE's description of the middle school curriculum as a necessary component. Only 55% of these teachers indicated that this type of curriculum is regularly implemented (Alverson et al., 2021). A gap between belief and practice is a common theme in research on the middle school concept (Alverson et al., 2021; McEwin & Greene, 2011; Rheaume, 2022).

An exploratory curriculum is responsive to the developmental and cultural needs of adolescents. Jansen and Kiefer (2020) describe the development of adolescents as a "tug-of-war" between their social–emotional abilities and their cognitive abilities (p. 19). A curriculum that allows for exploration responds to adolescent development and cultural responsiveness. Additionally, an exploratory curriculum makes learning relevant for students. Further, a deficit mindset toward young adolescents, middle school, and urban settings influences curriculum design and instruction (Kratz & Davis, 2022; Warren, 2022). Project-based learning (PBL), where two or more teachers collaborate to plan, implement, and evaluate a course of study, is a concept that fits the middle school concept's standards of exploratory and integrative curriculum (Almulla, 2020; Bishop &

Harrison, 2021). Markula and Aksela (2022) discovered that teacher knowledge in how to implement PBL varies and therefore teachers need specialized training to implement PBL effectively. Additional research indicates PBL has positive effects on student learning in at the middle level (Zhao et al., 2023; Zhao & Wang, 2022). The exploratory nature of an effective, culturally responsive middle school curriculum allows students to discover things about themselves and understand the possibilities the world has to offer (Bishop & Harrison, 2021; Muhammad, 2020).

In addition to academic success, social-emotional growth is also a tenant of the middle school concept (Bishop & Harrison, 2021). Strahan and Poteat (2020) explored students' self-awareness, self-management, social awareness, relationship skills, and responsible decision making, finding that when social-emotional learning (SEL) was integrated into lessons students were more engaged, made greater academic progress, fostered stronger social awareness, and showed improved decision making. Bishop (2023) explored the same areas as Strahan and Poteat (2020), finding that students perceived social awareness and responsible decision making as crucial areas to target SEL. Participants felt that respect and empathy for others, specifically in terms of difference, diversity, and equity must be the focus of SEL in middle schools. The middle school concept calls for schools to be affirming and inclusive, and SEL provides students with the opportunities to explore themselves and their impact on others (Bishop, 2023; Bishop & Harrison, 2021; Main & Whatman, 2023; Strahan & Poteat, 2020). Wang et al. (2022) concluded that students with stronger SEL skills have greater leadership qualities. Targeted social-emotional skills programs develop students' skills and impact student

engagement and improve academic success and future success (Main & Whatman, 2023). Effective middle schools offer culturally sensitive, integrated SEL that allows students to develop positive mindsets and the social emotional skills necessary for success in school and in life Bishop, 2023; Bishop & Harrison, 2021; Strahan & Poteat, 2020; Wang et al., 2022).

Curriculum, assessment, and instruction must be integrated (Bishop & Harrison, 2021). When curriculum is integrated, students receive instruction across disciplines rather than each subject in isolation (Merritt, 2023). Active and authentic learning occurs when students engage in inquiry relevant to real-life and cultural backgrounds and have choice and voice in their learning (Bishop & Harrison, 2021). Research shows that the integration of curriculum has a positive impact on student engagement and increases academic success (Bousalis & Furner, 2020; Cassidy & Puttick, 2022; Gardner & Tillotson, 2020). Research conducted by Shargel (2022) indicates that an integrated curriculum positively affects students, making connections across disciplines, effective groupings of students, team teaching, and student ownership of learning. Trinter and Hughes (2021) conducted an exploratory study concerning middle school teachers' development of integrated curriculum units. They concluded that teacher-designed integrated curriculum units allowed student learning to thrive (Trinter & Hughes, 2021).

An integrated approach also allows for equity and access and motivates students to participate in learning (Bishop & Harrison, 2020). Şuteu (2021) emphasizes the necessity of developing metacognitive and self-regulated learning to make students active participants in their learning. According to Turk (2021), middle school is a unique time to



foster active learning by personalizing it through a focus on collaboration and inquiry. Purposeful integration of culture into the curriculum is necessary for developing culturally responsive pedagogy in schools (Muhammad, 2020). Equity and access to a standards-driven, exploratory, and culturally responsive curriculum provide students at the middle level the voice and choice necessary to be motivated and engaged in their learning (Bishop & Harrison, 2021; Rupenthal & Furuness, 2020; Turk, 2021).

Assessment of learning must also align with middle school students' cultural and developmental needs. Effective assessment is ongoing, varied, and used to inform instruction (Bishop & Harrison, 2021). Academic achievement is a continuing challenge in middle schools (Alverson et al., 2021). Using pre-assessments, formative assessments, and summative assessments, or using assessment for learning, of learning, and as learning, based on standards aligns with the middle school concept (Bishop & Harrison, 2021; Sowa et al., 2021). Multiple ongoing formative and summative assessments support the middle school concept standards (Bishop & Harrison, 2021). A study conducted by Virtue & Pinter (2023) explored middle-grade education, and the school under study's use of an authentic standards-based assessment yielded positive results. PBL, along with other methods for integrating curriculum, requires teachers to collaborate in all aspects of teaching and learning, including assessment (Almulla, 2020). Research indicates that authentic assessment of student learning through collaborative teaching and integration of content areas yield improved student engagement and overall academic success (Markula & Aksela, 2022; Zhao et al., 2023; Zhao & Wang, 2022). Additional research supports the democratic aspects of the middle school concept

(Ghaffar et al., 2020). Ghaffar et al. (2020) found that when middle school students were involved in developing and using co-constructed rubrics in the authentic assessment of their writing, their writing competency was positively impacted. In alignment with the middle school curriculum discussed earlier, authentic assessment is another aspect of middle-level education that is valued but inconsistently implemented (Alverson et al., 2021).

### **Leadership**

Exemplary middle-level leaders are committed to all aspects of the middle school concept (Bishop & Harrison, 2021). According to AMLE, middle-level leaders must be collaborative, knowledgeable about the development of adolescents, and committed to equitable educational practices and research (Bishop & Harrison, 2021). Middle-level leaders need to lead from the heart, head, and hands (Gray, 2023). Strong leaders focus on building relationships and motivating their educators, being intentional and reflective in their decision making, and leading through action (Gray, 2023). Rheaume (2022) supports the work of AMLE (Bishop & Harrison, 2021; Gray, 2023) suggesting that effective middle-level leaders must focus on building relationships with all middle-level stakeholders and be responsive and learner-centered, as well as maintain a professional disposition, and continue to build upon their own professional knowledge. School leaders in a study by Jimerson and Quebec Fuentes (2020) did not feel confident in their leadership content knowledge. Their research suggests that school districts need to support leaders in their development of instructional leadership using existing structures,

PD opportunities, and professional learning in collaboration with teachers (Jimerson & Quebec Fuentes, 2020).

In their study on middle-level leadership in schools, including both teacher leaders and administrators, Bento et al. (2023) proposes a shift from strict control and supervisory roles for middle leaders, toward leadership roles that engage in diverse learning experiences and promote communication about challenges and innovative processes in schools. Middle-level leadership should contribute to organizational adaptation to ever-changing environments (Bento et al., 2023). Shaked (2023), interviewed 24 leaders in middle-level positions to explore how they fulfilled their roles in leadership. The findings suggest that leading by expertise, collaboration, and example are characteristics of effective middle-level leaders (Shaked, 2023). Additional research suggests that school leaders that focus on building relationships and trust foster collaborative environments that improve student success (Harrison & Ashley, 2021). In their mini-review Liu et al. (2023) explored the concept of distributive leadership in middle schools. They suggest that distributive leadership, where leadership is shared, improves motivation and agency, creativity and critical thinking, collaboration and overall academic performance for all stakeholders (Liu et al., 2023). Distributive leadership has been shown to improve school climate, professional capital, teacher self-efficacy, and motivation (Demarco & Gutmore, 2021; Ryu et al., 2022).

Ruppert (2020) proposes that a true middle-level mindset is one in which leaders and all educators believe in the potential of young adolescents and build an environment that is equitable, responsive, and caring. Research indicates that effective middle-level

leaders lead through a developmentally responsive lens (Bishop & Harrison, 2021; Gray, 2023; Rheaume et al., 2021). Additional research suggests that effective middle-level leadership must also focus on being culturally responsive (Narine et al., 2022). Effective middle school leaders are responsive to the ever-changing students and our evolving world, and never stop learning themselves (Gurr & Drysdale, 2020; Gray, 2023).

### **Organization**

According to AMLE it is necessary for middle school organizational structures to build and maintain strong relationships between staff and students (Bishop & Harrison, 2021). Positive student-teacher relationships have a high positive impact on student achievement (Scales et al., 2020). Middle school philosophy suggests organizational structures that foster relationship building and meet the varying needs of middle school students (Bishop & Harrison, 2021). Organizational structures aligned with the middle school concept include advisory along with the developmentally appropriate instructional practices and active learning through rigorous and engaging curriculum explained earlier, along with advisory, interdisciplinary teaming, common planning time for teachers, and flexible block scheduling (Alverson et al., 2019, 2021; Bishop & Harrison, 2021; Jackson et al., 2000).

Unique and crucial to the middle school concept is the implementation of an advisory period (Bishop & Harrison, 2021; Jackson et al., 2000). During advisory, students are grouped for the purpose of SEL, mentorship and support, developing a sense of belonging, and promoting collaborative learning (Alverson et al., 2021; Bishop & Harrison, 2021). Alverson et al. (2021) reported that nearly 70% of participants report

that advisory is implemented in their schools and 46% of participants felt that advisory programs were very important. On the other hand, Rheaume et al. (2021) found that middle-level administrators did not feel that an advisory period was a necessary component of responsive middle-level education. Although research indicates that integrating SEL across the curriculum is more effective with young adolescents, Advisory periods are also used for developing students' social emotional skills (Bishop, 2023; Bishop & Harrison, 2021; Main & Whatman, 2023; Strahan & Poteat, 2020). More importantly, the advisory period connects each student with an adult advocate that they form a strong relationship with that will support their social emotional and academic success (Andrews, 2023; Bishop & Harrison, 2021; Brown, 2023; Smith, 2023). The advisory period is also a structure that can promote equity and social justice (Andrews, 2023; Brown, 2023; Smith, 2023).

Interdisciplinary teaming allows for an integrated curriculum that challenges and engages students (Berckemeyer, 2022; Bishop & Harrison, 2021; Jackson et al., 2000). Additionally, interdisciplinary teaching teams organize students into smaller heterogeneous groups within a larger school, allowing teachers and students to develop effective relationships to support teaching and learning (Alverson et al., 2021; Berckemeyer, 2022; Bishop & Harrison, 2021; Jackson et al., 2000; Rheaume, 2022). Berckemeyer (2022) identified 16 essential elements for effective teaming:

- “know what teaming is all about”
- “get everyone on the same page”
- “nurture and sharpen leadership”

- “carefully create and organize teams”
- “take the leap and become a team”
- “plan for hard work”
- “do not waste team-meeting time”
- “ditch scattered expectations”
- “spark team identity and unity with students”
- “discipline with consistency”
- “keep a razor focus on kids”
- “make academic success check habit”
- “cooperate on curriculum”
- “fit in with the rest of the school”
- “document everything”
- “never stop learning and growing” (Table of Contents section)

AMLE advocates for these essential elements of effective teaming to create successful learning communities (Berckemeyer, 2022; Bishop & Harrison, 2021). Both Rheaume (2022) and Alverson et al. (2021) found that 92% of participants valued teaming.

However, Alverson et al. (2021) found that only 60% of respondents use interdisciplinary teams. Common planning time for team teachers allows teachers to adapt their instructional practices to the students on their team, using data to create engaging learning opportunities (Berckemeyer, 2022; Bishop & Harrison, 2021). Research indicates that common planning time is often in place in school schedules; however, collaborative, interdisciplinary work is inconsistent (Alverson et al., 2021; Rheaume,

2022). Teaming as an organizational component of the middle school concepts is highly valued, though appears to be inconsistently implemented (Alverson et al., 2021; Rheume, 2022).

Flexible block scheduling allows middle schools to be developmentally responsive to the needs of young adolescents (Perez, 2022). Flexible scheduling supports the exploratory learning essential to the middle school concept (Bishop & Harrison, 2021; Perez, 2022). Furthermore, flexible scheduling allows teams to group and regroup studies as needed (Bishop & Harrison, 2021). Flexible block scheduling allows for more time to engage in learning and supports the use of PBL and integrated curriculum consistent with effective middle-level practices (Almulla, 2020; Bishop & Harrison, 2021; Morris, 2022; Zhao et al., 2023; Zhao & Wang, 2022). Studies indicate that although teachers value the benefits of flexible scheduling, less than 10% of those studied implement flexible scheduling (Alverson et al., 2021; Rheume, 2022). Research shows that most middle schools maintain uniform periods consistent with the junior high approach (Alverson et al., 2021). In collaboration with AMLE, Perez (2022) suggests considering the cultural aspects of schools when developing strategies to create responsive middle-level schedules. Perez provides ideas for traditional and block schedule options that would support the middle school concept (Perez, 2022). Overall, an effective middle school schedule supports the middle school concept (Bishop & Harrison, 2021; Perez, 2022).

Although research indicates that tracking, or grouping students by ability, is prevalent in most middle schools, it contradicts the fundamental concept of the middle

school model (Alverson et al., 2021; Bishop & Harrison, 2021; White, 2021). Tracking does not allow for equitable learning for all students, reinforcing the inequities in our culture; poor and minority students are often placed in lower levels (Alverson et al., 2021; Benson et al., 2020; Fewell et al., 2021; Roo et al., 2020; White, 2021). Kangas and Cook (2020) found that tracking places English learners in lower-level classes, resulting in inequitable access to learning. Tunç and Ülker (2020) examined tracking and found that schools with tracking systems in place further exacerbate inequality. Strello et al. (2021) used data from three large scale assessments to determine the effects of tracking on inequalities and achievement. Strello et al. found that tracking had a negative effect on students that were already at a disadvantage. Otobo (2023) studied the effects of homogeneous and heterogeneous groupings in basic technology courses, finding that homogeneous groupings had a more positive impact on student success. Additional research concludes that tracking can negatively impact students' academic self-concept (Feuchter & Preckel, 2021; Fleischmann et al., 2021; Legette & Kurtz-Costes, 2020).

Preis (2020) explored inequitable practices in education, concluding that tracking is often determined by behavior and work habits rather than academic ability, the difference between levels is often in the quality of teaching and rigor with lower-level classes receiving low-quality and less rigorous teaching, and negatively impacts social capital. By utilizing common planning time and engaging in interdisciplinary teaming, teachers in successful middle schools collaborate to evaluate student learning and adjust their teaching methods to cater to the diverse needs of all learners (Bishop & Harrison, 2021). This approach acts as a protective measure against the detrimental consequences



of tracking, which run counter to the principles of the middle school concept (Bishop & Harrison, 2021).

### **Middle-Level Teacher Preparation**

AMLE posits that effective middle school teachers must not only be knowledgeable in their content areas but must also be specifically trained to work with young adolescents (Bishop & Harrison, 2021). The revised standards for middle-level teacher preparation include five standards made up of 16 components (Hurd, 2022). The standards are middle-level philosophy and school organization, young adolescent development, middle-level curriculum, middle-level instruction and assessment, and middle-level professional roles (Hurd, 2022). These standards support all aspects of the middle school concept and the new research agenda for middle-level education, which strongly advocate for middle-level educators who are specifically trained to work with young adolescents (Bishop & Harrison, 2021; Hurd, 2022; Mertens & Caskey, 2020).

According to Alverson et al. (2021), many respondents indicated that teachers with middle school teacher certification are very important in effective middle schools. Respondents also indicated that certified middle-level educators were regularly employed in their schools (Alverson et al., 2021). Despite this, other research indicates that many middle-level teachers are trained for teaching at the elementary or high school levels and not specifically trained to teach young adolescents (Caskey & Swanson, 2023). Due to the lack of specialized training, PD for middle-level educators must be job embedded with adequate coaching and feedback (Bishop & Harrison, 2021; Caskey & Swanson, 2023; Swanson & Caskey, 2022).

Recent research on the brain development of young adolescents indicates the need for a shift in how we teach students at the middle level, which aligns with the need for specifically trained middle-level educators (Bishop & Harrison, 2021; Hurd, 2022; Jansen & Kiefer, 2020). Historically, the middle-level teacher preparation standards called for standards that focused on developmentally responsive pedagogy, organizational structures, and collaboration. The framework for the revised standards is more holistic, taking an asset-based approach to developmentally responsive pedagogy, and includes equitable and culturally relevant and sustaining pedagogy (Hurd, 2022). Caskey and Swanson (2023) suggest that mentoring can be used to support middle-level teacher development when middle-level teachers lack the specialized training the middle school concept calls for. Furthermore, culturally relevant or sustaining pedagogies have received a great deal of attention in the last decade, indicating a need for PD in this area for veteran teachers who may not have received training in this area (Neal, 2022).

According to the National Council on Teacher Quality (2020), 34 states require teacher licensures specific to middle-level education. Teacher preparation programs must prioritize middle-level licensure to meet the requirements of the middle-level teacher preparation standards (Bishop & Harrison, 2021; Hale, 2020; Hurd, 2022). The middle school concept calls for the specialized preparation and credentialing of middle grades teachers to best meet the needs of young adolescents (Bishop & Harrison, 2021; Hale, 2020; Hurd, 2022).

## **Summary and Conclusions**

The middle school concept framework developed by AMLE is outlined in Chapter 2. The essential attributes of successful middle schools implemented holistically create opportunities for student success. However, there is a gap in practice between the expectations of the middle school concept as defined by AMLE and what is implemented in middle schools. The literature in Chapter 2 establishes the relevance of the middle school concept as a framework for successful middle schools. The present study will analyze teachers' perceptions of the middle school concept and their needs for additional support with applying it. To close the gap between the middle school concept and what is currently being implemented, the following study addresses the gap in practice regarding teachers' experiences and challenges with implementing the middle school concept. Chapter 3 presents the methodology for the study.

### Chapter 3: Research Method

The purpose of this qualitative study was to explore teachers' perceptions of the middle school concept and their need for additional support with applying it. I investigated and explored the implementation of the middle school concept through a collection of teachers' experiences. These experiences included teachers' knowledge of the middle school concept and their implementation of it, along with their perceptions of their preparedness to teach at the middle level and the ongoing PD they have received or wish to receive. Effective middle-level education components include the following attributes: responsive, challenging, empowering, equitable, and engaging. In this chapter, I describe the role of the researcher, participant selection methods, and data collection. I also outline trustworthiness and ethical considerations to protect participants.

#### **Research Design and Rationale**

This study used a basic qualitative design. A basic qualitative design is appropriate to understand a topic within its natural context (Merriam & Tisdell, 2016). The purpose of my study was to explore teachers' perceptions of the middle school concept and their need for additional support with applying it in the three middle schools in the WSD. The RQs for this study focused on understanding teacher perceptions regarding middle school educational philosophy. Through a basic qualitative design, I interviewed middle school teachers at the three middle schools under study to gain a detailed understanding of the perceptions of the middle school concept present in the schools and the extent of PD requirements from teachers. Merriam and Tisdell (2016) stated that basic qualitative design is the most used research method in educational

settings and that basic qualitative design aims to identify how people come to understand their own experiences.

Data collected through qualitative research is richly detailed and focuses on the individuals or groups under study (Creswell & Poth, 2016; Thomas, 2017). As an instructional coach, I collaborate closely with teachers at the study site in all three middle schools. I am not in a position of authority, nor do I have a supervisory role with any potential participants. A basic qualitative design allowed me to conduct interviews addressing the RQs (Merriam & Tisdell, 2016).

I chose a basic qualitative design over a case study, ethnography, grounded theory, or phenomenological method for several reasons. Burkholder et al. (2020) explained that case studies often depict an in-depth analysis over an extended period. Although exploring middle-level educational philosophy through case study research was an option, the considerable time and resources required to gather the necessary data were unavailable to the current study. In addition to interviews, case study research requires observational data and a review of artifacts, policies, and other forms of data within the bounded unit that would not have been feasible in the current study (Burkholder et al., 2020). Additionally, a case study's longitudinal design would require study over a significant period that would not suit this study's purpose (Merriam & Tisdell, 2016; Yin, 2018). An ethnographic approach also takes significant time and does not apply to this study because no shared culture applies to the research group. One focus of this study is to determine teachers' perceptions, and without an existing set of beliefs and values, an ethnographic approach would not have been appropriate. A phenomenological approach

explores examining perceptions and experiences of a phenomenon but not the usefulness of that phenomenon (Burkholder et al., 2020). Because teachers' perceptions of the middle school concept include their beliefs about its usefulness, a basic qualitative approach was chosen instead of a phenomenological approach. A quantitative approach was not considered for this study because the study will focus on perceptions rather than numerical data or statistical analysis. This study addressed the following RQs:

RQ1: What are teachers' perceptions of their knowledge about and application of the middle school concept in the middle schools in the WSD?

RQ2: What are teachers' perceptions of the extent to which the middle school concept is being applied in the middle schools in the WSD?

RQ3: What are teachers' recommendations about the PD and support needed for applying the middle school concept in the WSD?

### **Role of the Researcher**

During this study, I was an employee in a large urban school district in New England since 2000. I taught first, fourth, fifth, sixth, and eighth grades in that period. Currently, I am an instructional peer coach for the three middle schools. I have built collegial relationships with teachers, support staff, and administrators throughout my employment. I have established credibility through various leadership roles, such as director of a district-wide program, curriculum liaison for middle school English language arts, and by serving on various committees in my school district.

In this basic qualitative research study, I took the role of the interviewer. I conducted semistructured, face-to-face interviews with 15 middle-level educators. My

goal was to focus solely on the data presented in the interviews. I am not in a position of authority, nor do I have a supervisory role with any potential participants. Because of my position as a middle-level educator, I may have had a bias toward the middle school concept. My own perceptions on what effective middle-level education should look like and how it should be implemented are potential biases. I refrained from showing emotion or expression when interviewing participants to minimize this bias. To further reduce bias, I took notes during the interviews and cross-reference those notes with the digital recordings following the interviews. I did not interject my opinions on the interview questions or what I expected in responses. I relied solely on the information given to me in the interviews and asked for clarification when necessary to avoid including my own interpretations.

### **Methodology**

A basic qualitative design was used in this study. A basic qualitative design is appropriate to understand a topic within its natural context (Merriam & Tisdell, 2016). The purpose of my study was to explore teachers' perceptions of the middle school concept and their need for additional support with applying it in the three middle schools in the WSD. The RQs for this study focused on understanding teacher perceptions regarding middle school educational philosophy. Through a basic qualitative design, I interviewed middle school teachers at the three middle schools under study to gain a detailed understanding of the perceptions of the middle school concept present in the schools and the extent of PD requirements from teachers. Merriam and Tisdell (2016) stated that basic qualitative design is the most used research method in educational

settings and that basic qualitative design aims to identify how people come to understand their own experiences.

Data collected through qualitative research is richly detailed and focuses on the individuals or groups under study (Creswell & Poth, 2016; Thomas, 2017). As an instructional coach, I collaborate closely with teachers at the study site in all three middle schools. I am not in a position of authority, nor do I have a supervisory role with any potential participants. A basic qualitative design allowed me to conduct interviews addressing the RQs (Merriam & Tisdell, 2016).

### **Participant Selection**

Fifteen participants were selected using purposeful sampling. Purposeful sampling allows participant selection based on individuals most suitable for addressing the research problem (Merriam & Tisdell, 2016). Purposeful sampling allowed me to select middle school teachers who would provide relevant, detailed data about teacher perceptions of the middle school concept. According to Merriam and Tisdell (2016), a typical sample for basic qualitative methods includes a small group of participants which will provide specific data related to the RQs.

### **Instrumentation**

No specific instruments were utilized in this study. The interview protocol functioned as an instrument for conveying the interview questions to the participants.

### **Procedures for Recruitment, Participation, and Data Collection**

I used purposeful sampling. This study's participants included teachers with years of experience and any level of education in Grades 6 through 8. Additionally, the sample



included a minimum of two teachers who were teaching prior to or during the district's transition from a junior high model in 2003. A letter of invitation was sent to middle school teachers at the study site through electronic mail (see Appendix A). This letter included my name and contact information, a willingness to participate form, confidentiality information, and a summary of the purpose of the research. I anticipated recruiting 12–15 participants to complete this study. Due to the qualitative nature of this study, I concluded that a small sample size was sufficient to gather in-depth details about teachers' perceptions.

Once I received responses of interest, I contacted those teachers directly. In this follow-up communication, I reviewed the information in the initial invitation and scheduled times to meet with each teacher. If more than 12–15 teachers were willing to participate, I would have chosen the first 12–15 respondents to respond, ensuring that at least two of them were teaching when the district first transitioned from junior high schools to middle schools. At this point, I contacted all teachers, informing the additional teachers that if any of the first 12–15 participants chose to withdraw from the study, I would contact them again. To maintain confidentiality and protect identity, I assigned each participant a number. No identifying data was made public through verbal or written means.

Teachers responded with their interest to the initial email. I selected teachers and notified them by email of their participation in the study. Teachers who were not selected for the study were also notified at that time. A letter of consent to participate in the study was attached to the email. Teachers were asked to respond to the email stating that they

consented to participate in the study, and they were informed that a hard copy of the consent form would be provided at the interview. Each participant was given compensation in the form of a \$15 gift card and a thank-you card as a gift of appreciation upon completion of their participation in the study. Additionally, a thank-you card would have been given to any participant who chose to withdraw from the study.

The email contained a link to a sign-up on SignUpGenius to schedule the interviews. Participants could select from several interview dates and times that would accommodate their schedule. If the available dates and times were inconvenient for a participant, I reached out to schedule those interviews at times that work for the participant. I offered multiple days and times and was as flexible as possible in scheduling interviews to accommodate the participants. Participants were given 1 week to schedule the interviews, and if interviews were not scheduled by that deadline, I reached out to the participant either in person or through electronic mail.

The interviews occurred at times that were most convenient to participants. If a participant wished to use their planning period, interviews occurred during the school day. If the participant preferred to have the interview after school hours, those requests were also be honored. I conducted each interview in an empty classroom, office, or a private residence, and a "Do Not Disturb–Interview in Progress" sign was posted. The interviews averaged around 25–30 min, and the total data collection period took 1 month.

Collecting data through interviews is common in qualitative research because it allows the researcher to gather information about participants' understanding of a specific issue under investigation (Merriam & Tisdell, 2016). Before beginning each interview, I

used the interview protocol to preview the purpose of the study, measures to ensure confidentiality, the recording policy, and the participant's right to withdraw from the study at any time (see Table 1).

**Table 1***Interview Protocol*

Step no.	Procedure category	Specific procedure
1	Researcher and participant Introductions	The researcher will introduce themselves and provide a brief background. The researcher will ask participants to provide a brief overview of their teaching experience and role in the district.
2	Discussion of expectations and purpose of the study	The researcher will clarify the purpose of the study and what participants can expect during the interview.
3	Confidentiality review	The researcher will emphasize the importance of confidentiality and will explain the measures in place to protect their privacy. The researcher will clearly outline recording policies, explaining how data will be used and stored, and inform participants of their right to cancel or withdraw from the interview at any point.
4	Participant questions and clarifications	The researcher will allow the participant to ask questions or seek clarification before beginning the interview questions.
5	Semistructured interview questions and probes (see Appendix B)	All questions will be given in the same order to each participant. Probes will be used to clarify or gather additional data.
6	Additional participant input	The researcher will provide time for participants to share additional thoughts or experiences not covered by the interview questions.
7	Expression of gratitude	The researcher will conclude the interview by thanking participants for their time and highlighting the significance of their contribution to the study. A \$15 gift card will be awarded to each participant who completes the interview process.

Each interview was audio recorded and later transcribed and coded. Research participants received an email summary of the main themes from the results as a member check. I asked participants to provide feedback regarding the themes. Participants also received an expression of gratitude for participating in the study. A \$15 gift card was awarded to each participant completing the interview process.

### **Data Analysis Plan**

Data analysis begins during data collection as researchers collect and analyze data, break the data down into categories and then generate findings that reflect the study's RQs (Merriam & Tisdell, 2016). The RQs developed for this study provided the focus of the interview questions. The interview questions for this study focused on teachers' perceptions of the middle school concept and the extent to which it has been implemented in their school district.

Based on the basic qualitative method, I followed these steps to collect and analyze data. First, I conducted interviews with 15 middle school teachers. The interviews were audio-recorded. After each interview, I wrote a reflection that included observations about the participant during the interview as well as my own insights and thoughts. I transcribed each interview from the recording.

After conducting all interviews, I read through each transcription, making notes as I begin open coding of the data. I analyzed the data through the constant comparative method. I compared each element within each interview and then compared every interview I conducted, coding the data with recurring terms and phrases (Merriam & Tisdell, 2016; Thomas, 2017). After completing the initial coding procedure, I conducted

the axial coding process. This process further refines the data by constructing related categories of terms and phrases. Examination of the axial codes revealed the major themes from the data. I documented if discrepant themes emerged from the data.

### **Trustworthiness**

Trustworthiness is crucial for effective qualitative research to establish credibility (Merriam & Tisdell, 2016). Procedures for trustworthiness were implemented to increase the validity of this study. The procedures included evidence of credibility, transferability, dependability, and confirmability.

### **Credibility**

Throughout qualitative research, the data collected must support the RQs (Merriam & Tisdell, 2016). In this study, I interviewed educators to determine how they make sense of the middle school concept and their experiences with it. A common method for ensuring credibility is member checks. Through member checks, the researcher elicits participant feedback concerning the emergent themes (Merriam & Tisdell, 2016). Following transcription and initial coding of an interview, participants were sent the themes from the findings to see if my interpretation of the data was consistent with their understanding of their own experience. I sent the themes via electronic mail and asked participants to review them and provide feedback if warranted within 2 weeks. Member checking supports the credibility of my research as participant responses validated the themes derived from the data (Merriam & Tisdell, 2016).

**Transferability**

Transferability enhances the impact of the research findings (Merriam & Tisdell, 2016). Researchers establish external validity so their research findings can be applied in various situations (Burkholder et al., 2020). Thick description of findings supports transferability. According to Burkholder et al. (2020), a thick description includes detailed descriptions of the setting, the participants, and the evidence. Thick description provided details that allowed me to make connections between the middle school concept and the participants at the study site. Thick description may also facilitate connections between the study site and similar districts.

**Dependability**

In qualitative research, researchers need dependability to ensure consistency in the research methods they employ compared to those used by other researchers (Merriam & Tisdell, 2016). The analysis and reporting of the data must be credible and trusted by other researchers (Creswell & Poth, 2016). To establish dependability, I made use of an audit trial. Audit trials are detailed records kept by the researcher throughout a study that allow others to follow the decision-making process of the researcher (Merriam & Tisdell, 2016). To create an audit trial, I kept notes throughout the research process. I documented the steps in my research. My notes described my experiences with the interview process. I also took notes detailing my decisions throughout the study and when analyzing and data. I included notes on the decision making when coding and categorizing the data.

**Confirmability**

The findings in a qualitative study must exclude researcher bias and allow other researchers to draw similar conclusions based on the research methods and analysis (Burkholder et al., 2020). I analyzed my assumptions and biases using a reflexive journal to establish confirmability. This journal allowed me to reflect on the research process, including my own perceptions, the decisions I made throughout the study, and my role in the research (Burkholder et al., 2020). Using a reflexive journal described my position in the research, allowing readers to understand how I came to the conclusions I drew from this study (Merriam & Tisdell, 2016).

**Ethical Procedures**

Ethical procedures are crucial to the credibility of research (Merriam & Tisdell, 2016). As a researcher, I employed ethical research methods to establish credibility and protect the participants. I followed Walden University's Institutional Review Board protocols and procedures for permission to conduct the study and to maintain ethical research methods. There may be ethical considerations concerning participation in this study. Participation in this study will be voluntary. Although I am an employee at the study site, my role is not supervisory. I reminded participants that I have no supervisory role with them. I detailed the purpose of my research and the methods I employed, and assured participants of confidentiality. In addition, participants were able to withdraw from the study at any point. Had a participant chosen to withdraw from the study, I would have chosen the next participant from the demographic questionnaire and followed the same procedures to notify the participant and schedule an interview.



Following Institutional Review Board protocols and procedures, I also obtained permission to conduct the study from the participating school district. Participants were informed of their participation in the study via electronic mail and must sign a letter of consent. I aligned the interview questions to the RQs. I employed various communication methods through the interviews, such as paraphrasing, perception checking, and asking clarifying questions to address participant concerns. All collected data were stored on password-protected personal devices, and participants' identities were kept confidential. All data will be destroyed 5 years from the completion of the study.

### **Summary**

The central elements of this chapter include the research design, role of the researcher, methodology, data collection, data analysis, trustworthiness, and ethical procedures. The purpose of this basic qualitative study was to explore teachers' perceptions of the middle school concept and their need for additional support with applying it. Purposeful sampling was used to select participants in the study. Data were collected through interviews, then coded, and categorized into themes. Trustworthiness was established through credibility, transferability, dependability, and confirmability, as described in Chapter 3. Chapter 4 addresses the results of the data. It describes the setting, including participant characteristics relevant to the study and data collection and analysis. Chapter 4 also includes an analysis of these data and how the results address the RQs.

## Chapter 4: Results

The purpose of this basic qualitative research study was to explore teachers' perceptions of the middle school concept and their needs for additional support with applying it. Educators can leverage the insights gleaned from this study to identify patterns in their perceptions of the middle school concept and to delve deeper into the necessary supports for future initiatives. I developed the three RQs for this study to gather educators' perceptions of and challenges with the middle school concept in the three middle schools in the WSD:

RQ1: What are teachers' perceptions of their knowledge about and application of the middle school concept in the middle schools in the WSD?

RQ2: What are teachers' perceptions of the extent to which the middle school concept is being applied in the middle schools in the WSD?

RQ3: What are teachers' recommendations about the PD and support needed for applying the middle school concept in the WSD?

The conceptual framework for this study and the basis for the RQs is the middle school concept, also referred to as middle school philosophy, based upon the AMLE's research (Bishop & Harrison, 2021). The middle school concept emphasizes student-centered education tailored to the developmental needs of young adolescents. AMLE ascertains that effective middle schools exhibit five essential characteristics: responsiveness, challenge, empowerment, equity, and engagement (Bishop & Harrison, 2021). The absence of any essential attribute may hinder a middle school's ability to effectively serve young adolescents (Jackson et al., 2000). I used AMLE's conceptual

framework for the middle school concept to support the RQs as the indispensable attributes and characteristics outlined within the framework are vital components for fostering successful middle schools.

In Chapter 4, I discuss the data collection and analysis procedures used throughout this study. I describe the participants and the setting and outline the method used for collecting and recording data. Additionally, any unusual circumstances encountered during the data collection phase are described. Furthermore, Chapter 4 will detail various coding strategies such as open, axial, and thematic analysis for data analysis. Each RQ was systematically addressed with supporting data to substantiate findings. The chapter will present evidence of trustworthiness, encompassing aspects of credibility, transferability, dependability, and confirmability. A summary of key points will conclude the chapter.

## **Setting**

### **Conditions**

On February 19, 2024, Walden University's Institutional Review Board approved my application (approval no. 02-19-24-0113413) to conduct my research study at three middle schools in an urban district in New England. I contacted middle school teachers via electronic mail on February 22, 2024. I began hearing back from interested teachers and started scheduling interviews. On March 1, 2024, I began collecting data through face-to-face, semistructured interviews of middle school teachers in Grades 6 through 8 with at least 1 year of experience and some knowledge of the middle school concept. Data collection continued through the month, concluding on March 29, 2024. This study

occurred during the latter part of the school year, when changes were underway as the middle schools under study prepared for restructuring in the upcoming academic term. This restructuring included the closure of one school and opening a new building. Additionally, several middle school teachers were at risk of losing their positions due to staff reductions. The restructuring and potential job losses may have influenced participant responses. This data collection resulted in teachers' responses regarding their perceptions of the middle school concept and their needs for additional support applying it.

### **Participants**

The selection of participants across grade levels included 10 general education teachers, two special education teachers, one world language teacher, one reading specialist, and one instructional coach. Participants' years of teaching experience are presented in Table 2. Five participants were teaching middle school in the district under study before or during the transition from a junior high model in 2003. In order to maintain confidentiality, the grade levels and teaching areas were not linked to the respective participants.

**Table 2***Participants' Years of Teaching Experience*

Participant no.	Years of teaching experience
1	20+
2	15–19
3	20+
4	20+
5	20+
6	20+
7	20+
8	10–14
9	1–5
10	1–5
11	20+
12	20+
13	20+
14	20+
15	20+

Within 2 weeks of my initial email, I received expressions of interest from 17 educators. Two educators who expressed interest did not meet the criteria because this study focused on understanding teacher perceptions. The individuals who were turned away were guidance counselors and administrators, who were not within the scope of this study's target participants. I thanked them for their interest and briefly explained why they did not meet the criteria for my study. Because I planned to interview 12 to 15 teachers, all other interested participants could participate in my study. Participants were given an electronic copy of the consent form and responded via electronic mail to indicate their consent to participate in the study. All 15 participants gave consent with the understanding that participation was confidential and voluntary. Participants were also

informed that they could cancel or withdraw from the interview at any point if they changed their mind about participating in the study.

### **Data Collection**

Data were collected in this study through semistructured, face-to-face interviews. Participants received a link to a SignUpGenius to schedule the interviews. Participants were not able to see each other's responses on SignUpGenius. Each interview was conducted following the interview protocol as outlined in Chapter 3. Interviews were not scheduled during instructional time. All interviews were held during teacher planning times or after school. Participants were given 1 week to schedule their interviews, and if they did not meet this deadline, I followed up with them either in person or through electronic mail. The interviews varied in length averaging approximately 25–30 min. Participants chose the time and location of the interviews. Two interviews were conducted in a private setting outside of school buildings, while all other interviews were conducted in teachers' classrooms or private location within the school. A "Do Not Disturb" sign was posted during each interview to limit interruptions.

I recorded the interviews using a voice recorder on my iPhone. I then transferred the digital recordings to my personal computer and deleted them from my iPhone. I transcribed the interviews using Descript, transferring word documents of the transcriptions to my personal password protected computer. I cross-referenced the transcriptions with the recordings to ensure that the transcriptions accurately stated what each participant said in each interview. After each interview, I wrote a reflection that included observations about the participant during the interview as well as my own

insights and thoughts. This reflexive journal allowed me to reflect on the research process, including my own perceptions, the decisions I made throughout the study, and my role in the research.

### **Variations in Data Collection**

There were no variations in the data collection from the data collection plan outlined in Chapter 3. However, two participants did not initially respond to my electronic mail to schedule the interview. Rather, these participants expressed interest in the study when they encountered me at their schools, and we arranged to schedule the interviews in person.

### **Data Analysis**

Qualitative methods were used to analyze the data with open, axial, and thematic analysis methods. The sample size of 15 participants is small enough that I did not need a program to assist in data analysis. Drawing from Merriam and Tisdell's (2016) qualitative analysis methods, I followed four steps in analyzing the data:

1. I began to organize the data by transcribing the interviews and reviewing the notes. I cross referenced my notes and recordings to ensure I captured all the information shared during the interviews accurately. I then read through interview transcripts and began open coding by annotating notes, comments, observation, and questions in the margins.
2. I started grouping my notes that appeared related, beginning the axial coding process. Moving on to the next interview transcript, I followed the same process, constantly comparing each interview with those proceeding it.

Throughout this process, I maintained a running list of comments that I updated as I reviewed each interview transcript. After constructing categories that captured recurring patterns, I proceeded with axial coding to explore the relationships and connections among the categories.

3. I began sorting categories and data, assigning codes that applied across multiple interviews. I renamed and combined categories as needed and began to identify emerging themes. For example, the codes “belonging” and “build relationships” were combined under the code “teaming.”
4. I used thematic coding to investigate the connection between the categories developed during axial coding. By closely examining each code, I discovered emerging themes and synthesized key findings from the data.

Following thematic analysis, I asked research participants to provide a member check to review the findings. Member checking enhances the credibility and trustworthiness of a study (Merriam & Tisdell, 2016). I sent participants an email containing the themes that emerged from the interview data and asked them to review the themes and provide feedback. Participants were given 2 weeks to review the data and respond.

### **Discrepant Cases**

Discrepant data, although potentially challenging or contradictory to emergent findings, is crucial to consider during data analysis as it adds to the credibility of the research (Merriam & Tisdell, 2016). Each participant’s viewpoint was valued in this study, and all data were thoroughly analyzed. No discrepant data were found.



## **Results**

Coding and thematic analysis were used to analyze the data. Six themes emerged from the data. The themes suggested that participants value teaching young adolescents, collaboration, shared understanding, effective leadership, and effective PD to support the implementation of the middle school concept.

### **Theme 1: The Benefits of Teaming for Students**

Every participant emphasized that the middle school years are a unique developmental stage. Participant 10 shared that the middle school concept “really emphasizes the development of the students.” Other participants noted that middle school is a time where students “go through the craziest years of their lives” and “become themselves.” Participant 10 shared that middle school is a “critical time because they are deciding who they want to be.” Nine participants noted that middle school is a crucial time to consider “the whole child.” Participant 13 articulated the unique development stage of middle schools by stating, “Developmentally, they’re ready to go. We have them, I think, for the perfect years where their brains are the most malleable.” With a laugh, participant 14 emphasized that middle schoolers are “a different breed.”

Another recurring point among participants was the belief that the middle school years are distinct from both elementary school and high school. Participant 8 remarked, “They’re not quite old enough or mature enough to be treated as high schoolers, but they are not elementary school kids either.” Participant 14 noted that middle schoolers are “definitely in between and that makes them very unique and different.” Five participants noted this distinction.

Participants also emphasized that middle school students need to feel welcomed and valued. Participant 1 indicated this by noting that “kids need to feel a sense of belonging.” Participant 13 stated, “A middle school kid can't make any gains until that middle school kid knows that he belongs here.” Several participants emphasized the pivotal role of middle school teachers in building meaningful relationships with students as a fundamental aspect of their job. Participant 3 stated, “Being a middle school teacher means a lot of relationship building,” while Participant 14 noted that middle schoolers “need the skills, they need the study skills, they need that kind of stuff, but really it's relationships and building that with them so that they can grow and hopefully they grow as people.” Participant 12 noted, “I think there, it should be a community in, in each team and there should be a team that builds the kids up and teaches them how to work together and to appreciate each other and their differences.”

For Participant 8, a successful middle school means,

Teachers having the time and space to get to know their children and learn about what they're good at, what they're not good at, their likes, their dislikes, their interests, develop relationships, and then to apply that to how to best instruct each individual kid. I do my best to get to know every kid in my room from starting the 1st day of school, and then continue to build that relationship throughout the year.

All participants unanimously agreed that teaming is a crucial tenant of the middle school concept. Not only did every participant note this, but teaming was also mentioned 250 times across all 15 interviews. Participant 1 emphasized that the team approach is a distinguishing factor that sets middle schools apart from high schools and elementary

schools. Participant 6 stated, “I feel teaming - where teachers are working together with groups of kids - is really important in middle school.” Participant 11 feels that teams “wrap around” students to get to know them and support them. “Functional teams” was a definitive response from Participant 2 when asked what components constitute a successful middle school. Participant 2 emphasized this by highlighting that middle schools need “a team of teachers who work well together and truly have the same goals or as closely aligned as possible. A team of teachers who believe in and understand the middle school model. Otherwise, what are we doing?” Participant 5 stressed that teaming “really is the key component to being a middle school, it’s this identity of a team, who’s not working as individuals with the same students but is actually working together to give students experiences that allow them to develop as people as well as students.” Participant 8 spoke of teaming by emphasizing that “being able to work with several different teachers to try and meet each student’s needs is hugely important.”

When discussing teaming, Participant 7 spoke about how teaming is an asset for teachers and students, saying, “We [teachers] need the support of a team to be effective.” Some participants also discussed challenges to teaming. Participant 13 noted “if we have one outlier on a team, then the other three or four people on the team have to work doubly hard.”

Not all teachers are a part of teams in the same way. According to one participant, special educators, reading specialists, world language, and unified arts teachers are often considered cross-team teachers. When asked to suggest improvements or changes needed to enhance the application of the middle school concept, that participant stated,

It would be finding a way to unite team and cross-team teachers. That divide feels very apparent even when the district tries to do inclusionary measures, but even when, if you're going to have, representatives from the building and every team gets one representative, but then unified arts, who are three teams worth of people get one rep - maybe it's not really as inclusionary as you realize.

Participants also discussed the cross-team teachers and teaming. Participant 13 stated,

One of the things that I worry about is that yes, I've been able to do it [teaming] with these people with whom I teach core subjects. We always leave the UAs [unified arts] out. And that's the sad part. I believe that it's the UA teachers who need it the most.

When asked if they were able to do any cross-curricular work with Unified Arts classes, another participant, who had extensive training on the middle school concept outside of the district on study, stated "I have yet to see a middle school that's done that right."

Although Participant 13 expressed concerns about the inclusion of cross-team teachers, they also emphasized the value of teaming stating, "We do what's best for kids. That's the most important thing. In order to enable that, we have to have teaming."

Participant 1 ended their interview by emphasizing,

It's powerful to be there when kids are changing quickly. And to get it right is to perhaps have, you know, a profound effect on, on their future path and outcomes. People can recover from a bad middle school experience, but if they have a great middle school experience, the sky's the limit, right?

**Theme 2: The Importance of a Collective Understanding**

All participants highlighted the inconsistent understanding of the middle school concept within the district, emphasizing the critical need to establish a shared and cohesive understanding across all middle schools to enhance their effectiveness.

Participant 1 supported this inconsistency by discussing the continued debate over the middle school model versus the junior high model. When asked to what extent teachers in the district understand the middle school concept, Participant 3 stated, “It's funny because I think in our district it really varies from school to school. We only have three middle schools so you would think, what kind of divergence of opinion can there really be?”

Participant 6's response supports this divergence:

There are definitely teachers that understand the middle school concept, but there are definitely, without a doubt, teachers that do not understand the middle school concept. I think they're scared of it. I think it's because they don't understand it.

Five participants pointed out that the district's understanding of the middle school concept is “getting better.” Participant 8 estimated that about 50% of teachers had a clear understanding, while Participant 5 characterized the understanding as “very weak,” and Participant 13 indicated that “not enough” teachers had a grasp of the middle school concept. Participant 10 noted, “I think understanding is pretty good. Implementation isn't always the best.” Two participants were uncertain about defining the middle school concept, requesting clarification after their interviews. Participants 3, 5, 13, and 14 each mentioned that the understanding of the middle school concept varied within and between schools. Participant 5 highlighted this,

I think before I even got here, which was almost 10 years ago, there was a very strong buy in to what middle school really meant. And so, staff who were here at that time, most, not all, but most really did embrace that philosophy and they had a very clear image of what those parameters were and what would make that [middle school] experience.

Participant 3 noted, “[School A], I think, had the most middle school...change, let's say. [School B] was sort of in the middle, and I think [School C] started to have the hardest time of it.” Participant 13 also felt that their school had collectively embraced the middle school philosophy at one point, but that turnover in teachers and leadership had impacted that collective understanding. Participant 13 discussed how new educators in their building do not understand the middle school concept and how that effects those that do:

And that's what has been exhausting for some teams. On the teams where there has been frequent turnover, and it's always someone new. It's not just how do I set up my grade book? It's how do I learn to be a middle school teacher in a building where middle school philosophy rules the roost? So that's been part of what we teach our colleagues.

The participants provided inconsistent descriptions of the middle school concept. While all participants mentioned aspects related to middle schools being responsive, they only occasionally referenced the other essential attributes of the middle school concept. Forty percent of the participants mentioned ideas related to engagement, relevance, and motivation in learning. Three participants mentioned that middle schools should be

challenging, while only two spoke to empowering middle schoolers with voice and choice. Participant 8 noted,

The components of a successful middle school are the flexibility to meet every kid where they are, and challenging every student to be part of a community and to develop whatever skills they're lacking and to build on the strengths that they have.

Sixty percent of participants emphasized the importance of curriculum. Several participants expressed that, although the middle schools were organized into interdisciplinary teams, the implementation of interdisciplinary curriculum and instruction was inconsistent. Participant 4 remarked,

The best middle schools integrate academics and show the connections between the disciplines. So, it's a lot, it's very unlike high school where they're all separate. It should be a blend where even at times when you're doing a project, kids don't know whether they're in math or science or something.

Sixty percent of participants mentioned interdisciplinary work. Participants spoke about motivating students through interdisciplinary activities. Participant 3 noted,

Well, I do work with my teammates to develop units and activities that connect to each other so kids can see that. And we can work on things from an interdisciplinary perspective, point of view, perhaps to make it more meaningful to their lives where I am a history teacher. So, one of my big objectives as I present anything is to think about how can I connect this to kids so it's not just

boring facts and figures, but more about look what happened in a great way or what happened in another way and how they could apply that to their lives.

Participant 9 explained that middle-level teachers need to be able to do “more project-based learning, you know, to give them that choice,” and Participant 15 described the need for “interdisciplinary study, which is critical to me to help kids make the transfer.”

Participants did not mention equity in middle schools. About 70% of participants did mention English language learners (ELL), though these comments were focused directly on recent PD and not on a call for equity. One participant shared, “We've been focused on ELL,” whereas another referred to “mandatory ELL training.”

Advisory, a critical structure in the middle school concept, was only mentioned by 60% of participants. Participants discussed Advisory as a time for “relationship building” and that building relationships is “very important.” Participant 4 stated, “The point of advisory is making connections.” One participant said, “advisory is a must” while another explained how the focus on advisory has varied, “Advisory, which currently it's 5 days a week. It has been 3 days a week. It has been 2 days a week. It has been non-existent. I don't know what it is at the new school.” Participant 13 spoke to their school's experience saying, “We worked on hardcore advisory development. And it felt magical. We knew our kids, our kids knew us, they knew they were cared about and we were getting more out of them because of it.”

A slight majority (53%) of the participants mentioned SEL. One participant explained that in middle school, students' “emotional needs need to be met,” whereas another described the need for teaching “the whole child and their social-emotional



growth.” Participant 10 explained that in middle school “it’s more about those social skills, those developmental skills.” Participant 7 explained, “It’s our job to deal with all of that, that social emotional stuff, and try to get them to learn something too.” Participant 1 emphasized that when middle schoolers need support, they should be able to “get any level of support that they need and it’s not stigmatizing.” Participant 6 discussed the balance between academics and SEL, “There’s emotional needs. There’s academic needs. There’s both. And so I mean, you just got to be aware of both because of where they are.” Participant 8 remarked, “We need to do everything we can to meet kids where they are and further their growth, not just academically, but socially and emotionally, and as an individual.”

About 70% of participants commented on how middle schools group students, and 53% referred to flexible grouping of students. One participant favored homogeneous grouping of students saying, “I do believe that there is a time and place for heterogeneous and homogeneous grouping.” All other participants that mentioned the grouping of students were against ability grouping. Participant 14 spoke to a recent change in the district, saying “getting rid of leveling was huge.” Participant 8 shared, “My team works really well together in trying to meet each kid’s needs. So, developing plans to support them, regrouping them as often as we can.” Participant 13 advocated for flexibility saying, “We need the ability to change this grouping. If by changing the groups to what the teachers think are the best academic groupings, by taking Billy away from his arch nemesis, Bobby, so that each of them has a better opportunity to work. Why isn’t that best for kids? And if that’s best for kids. Shouldn’t we be the stewards of that?” Other

participants discussed how their thinking about groupings had changed throughout their careers. Participant 7 stated,

Before I started teaching middle school, I thought that we should heterogeneously group students... I really loved homogeneous grouping because I found that my foundation's kids, it was easier to push, push them and take them from where they were at if they were all together... and now, I did the research, and there's still an argument for homogeneous grouping, but, I had to ask myself if I didn't want to do heterogeneous grouping because I was being lazy.

Participant 4 spoke about being against heterogeneous grouping because of being a “product of honors” level themselves. Participant 4 reflected,

I now see as a teacher, the benefits of it for all kids, I definitely see the benefits for the mid and low struggling, the struggling kids, because in my experience, they all rise to higher level when they're mixed in.

Nearly 90% of participants emphasized the need for differentiated instruction in middle school. One participant referred to response to intervention, and another mentioned a “flex day.” Participant 8 attributed the irregular implementation of differentiation to ability grouping:

Differentiation is a huge problem because we were leveled for so long, that a lot of my colleagues think that differentiation is - I'm just going to print off a different reading and give it to all the kids. Cause that's that group of kids, they get that reading. And that's not what effective differentiation looks like.

Overall, participants valued differentiated instruction but acknowledged that it was not implemented regularly. One participant shared, “I know how to differentiate instruction,” while another participant stated, “Differentiation? I don't know how you go about doing that.”

Approximately 70% of participants discussed middle school scheduling, and among this subset, 80% specifically mentioned “flexible scheduling.” Participant 2 stated successful middle schools have:

Flexible schedules, like time frames for kiddos who maybe need extra time with math or kiddos who need extra time with reading the schedules are set up in a way that all the kiddos are on team together and they, the teachers have the flexibility to say, Hey, I need the kids for 10 extra min today and the other teachers on the team allegedly are able to say that works just fine.

Participant 5 discussed the reality of the schedule in their school, “The schedule, the practice of our schedule that rules everything.” Another participant emphasized how the current schedule impacts cross-team teachers: “The schedule logistics are very tricky unless you have enough staff to associate non English, math, science, social studies teachers with teams.” Participant 14 emphasized wanting to “make up our own schedules,” while participant 13 discussed having had the ability to be more flexible with the schedule in the past. Participant 12 explained that “the schedule drives most of the services and the way education is placed in middle school.” Participant 4 identified the existing schedule as a hindrance to interdisciplinary collaboration. Participant 8 clearly

articulated that when it comes to embracing the middle school concept in the district, “The schedule is an obstacle.”

Participants discussed the climate and culture in their schools and district, with one participant sharing, “Depending on the school...you have a very different culture.” Participant 13 discussed the need for “building school culture” while Participant 15 claimed there is, “a shift in culture, that is impacting the middle school philosophy.” Parent involvement was only mentioned by 3 participants. When asked what a successful middle school needs to have, Participant 2 stated, “Let's get the parents in here.” Other participants implied that there was inconsistent parent involvement, with one participant saying that with parents “there's no partnership.”

Participants mentioned that policies and practices affect culture and climate. Participants referred to leveling, flexible grouping, discipline, leadership, and general understanding of the middle school concept as impacting climate and culture. Participant 15 specifically referred to “student apathy” and the school’s response to it as a reflection of school culture. Participant 15 stated:

I think we have a very apathetic group of kids. And I think the middle school concept is really hard when you have the majority of your kids in class kind of apathetic. It's really hard to hook them in, to excite them about anything.

Thus, the consensus among participants was that inconsistent practices supporting the middle-level concept negatively impact the overall climate and culture of the schools.

Every participant emphasized the need for a collective understanding of the middle school concept. Participants identified turn over in teachers and leadership

causing people to “lose sight: of the middle school concept, and how not everyone was “on the same page.” Over half of the participants called for district leaders to create a clear definition or vision of what they want the middle school experience to be in the WSD. Participant 2 stated, “I think if they had a clearly defined middle school model/ concept and they had resources and procedures in place to help teachers adopt and implement the middle school model, that would be fantastic.” Other participants acknowledged that the inconsistent understanding of the middle school concept indicates the need for a collective definition, saying “People need to know what the middle school concept it.” Participant 4 pointed out that “middle school teachers and our middle school leaders should come from programs that train them in the middle school idea.” All participants highlighted the need for “getting people on board” and being “on the same page.” Participant 8 specifically stated, “We all need to be on the same page about what this middle school is going to look like.” Participant 10 noted,

If we could get at least the majority of teachers behind the why [of the middle school concept], then I think the how to would kind of fall into place a little more. I think just being strong on that front from administration down - this is what our vision is for our school.

Participant 11 emphasized the challenges arising from the lack of alignment among educators regarding the middle school concept.

Even for us working towards the middle school philosophy, the other teachers who aren't part of that aren't getting that message. It isn't trickling down except for just a few of us. So they are definitely, you know, they work in isolation.

Participant 15 articulated the need for a common vision for middle schools in the WSD:

If they [district leadership] really want to move forward, I think they have to define the middle school concept, what they want. And then I think they have to, work to design that and hold each individual school accountable for doing that. You know, I think they have to prioritize. Do you want small teams? Do you want interdisciplinary assignments? What kind of grouping do you want?... I think you have to start by defining it. And then I think you have to start by working with the teachers. And getting some agreement with small groups of teachers in terms of what are you going to do?

### **Theme 3: The Need to Overcome Teacher Resistance**

Each participant emphasized that teacher buy-in could be a significant barrier to fully implementing the middle school model in the WSD. Participant 13 shared,

It all goes back to ‘Do you understand the middle school philosophy?’ We have a person in this building who sat on the steering committee with us. She's been here since [we transitioned from a junior high model to a middle school model]. And at one of our first steering committee meetings, she had the courage to say -out loud in front of how many of us were on that committee. 20? and our entire administrative team and all of the principals - she said, “I don't know what middle school philosophy is.” But that was the most telling statement for me.

Participant 12 highlighted the difficulties of dealing with an “outlier” within a team: “It's very disruptive, especially for the kids, because if they don't all have the same philosophy and the same model concept, it will disrupt the kid's understanding and expectations.”

Other participants expressed that “People are very stuck in their ways here,” and that “there are people who want to hold on to a junior high model.” Participant 5 simply stated, “We need buy in.” Participant 3 reflected,

There's some teachers who are hesitant...you know, being a middle school teacher means a lot of relationship building. And for some of our more traditional teachers, that's not the basis of their instruction. They're more of a task manager and not a relationship builder. So, I think they might feel a little afraid or hesitant or not comfortable with the evolving role of middle school teachers.

Participants 1 and 7 highlighted that teacher mindset posed a barrier to change.

Participant 7 acknowledged that although it might not be fair, people's attitudes largely influenced this barrier, which could potentially change over time. Participant 1 highlighted specific aspects of mindset as a barrier, noting:

The mindset of teachers, not only that were around before we were middle schools, but also those who are taken under the wing by those who were around before we were middle schools. We have a group of teachers that have differing opinions about whether they really are in it with the middle school model.

Another participant also shared this: “I do think that there are people who want to hold on to a junior high model.” Participant 6 explained that there are, “very strong vocal people that are very junior high.” Participant 8 reported,

The main barrier that we're going to encounter if we are going to try and implement the middle school model is buy in from the teachers who have been around for 30 plus years who still operate as if it's a junior high.

Participant 11 also touched on this point saying, “In this district, we really have been um, a junior high school.”

Participant 2 indicated that some teachers and grade levels have embraced the middle school concept:

There's some who really have it. They definitely got it. They have, they collaborate well with their teams, they collaborate so well with their content area teachers. I think some of like 6th grade here, I think they've got it.

Participant 6 also identified a specific grade level as having the middle school concept:

Sixth grade is definitely more in the middle school concept. And I think it's because the majority of sixth grade teachers at one time were in elementary, and I think elementary kind of lends itself to the middle school concept, where I think the junior high model lends itself to high school. So, I think definitely the sixth grade lends itself more to the middle school and has an easier time with it rather than the seventh. Not all, but some of the eighth grade I think has a harder time.

Participant 4 shared that they “don't think the district breeds middle school teachers,” and Participant 15 indicated that teachers understand however much they “want to understand” about the middle school concept. Participant 6 indicated that “Specific people have stood out and complained and made it sound like [the middle school concept] was not a good thing.” Participant 6 elaborated,

I think the older teachers just are like, you know, this is what is worked. So why are we going to fix something that has worked? People who haven't tried anything



different or haven't taught anywhere else don't know any better and change is scary.

The divisive atmosphere was clearly articulated by Participant 8 who said, "I think that some of my colleagues understand [the middle school concept] well and are advocates for it. I think that a lot of my colleagues are not."

Participant 15 highlighted that the district needs to admit that what they are doing is not working:

I think the first thing, like Alcoholic Anonymous, we have to admit that it's not working. And I think the egos are too strong and the policies have gotten so far away that you are not willing to admit that this is not working. People just care about their jobs. Each principal just cares. They're afraid to say this is not working and they don't do it. This is not working. Somebody needs to say it.

Participant 10 emphasized, "You have some old school thinkers versus some new school thinkers and the gears of progress can be slow in moving."

#### **Theme 4: School Policies and Practices as a Barrier**

All participants believed that some school policies and practices impede alignment with the middle school concept. When asked to what extent the policies and practices of the WSD align with the middle school concept, Participant 8 stated,

They don't. We are still glorified junior highs. Between whether it's grouping or scheduling or how the buildings are staffed. It doesn't align with the middle school philosophy entirely because it's the way it's always been done, and change is hard.

Participant 15 expressed that in their school they are “not able to institute middle school philosophy well under the parameters that we have in the building.”

Nearly 70% of participants mentioned scheduling. While most identified “flexible” scheduling as necessary for effective middle schools, all participants indicated that middle schools in the WSD lacked this flexibility. Participant 10 stated that schedules are “the biggest hurdle,” and Participant 8 noted that “the schedule is an obstacle.” Other participants spoke of the schedule as a barrier for cross team teachers like world language and unified arts teachers to be a part of teams. Participant 4 emphasized how the schedule restricts interdisciplinary work, explaining that teachers lack the “flexibility” to have extended blocks of time to collaborate with teachers in other disciplines. Participant 3 expressed frustration with the short, regimented schedule, particularly the 18-min lunch period, which hinders opportunities for meaningful community-building and bonding with students due to the limited time available. Participant 11 emphasized, “The practice of our schedule that rules everything... the fact that’s [the schedule] not flexible.” Participant 3 stated that we need to develop “a schedule that’s flexible and meets the needs of the learners instead of meeting the needs of the administrators.” Other participants described that practices such as advisory, content driven curriculum, and teaming are in place but need improvement.

Several participants discussed a recent change in a policy on ability grouping. Participant 11 emphasized that although the leveling policy recently changed, stating, “we had leveling until like a few months ago,” other existing policies and practices still do not support the middle school concept. Participant 1 explained,

We've had a large debate about our policies and practices this very year.

Interestingly enough, our district does not have a policy for the high school level and has very minimal policy for the elementary level. But there were policies written into the Board of Ed kind of policy book when we became middle schools, when we stopped being junior highs and became middle schools, simply because some people really didn't want to embrace the middle school model. And so, there is a middle school policy that has had to have some tweaks done to it to really get in sync with the true middle school model.

Participant 13 also spoke about how the change in leveling was a good move forward, saying,

Last year, I would have said not well. This year, I feel that on paper, legally, policies, procedures, POPPs [policy and procedures manual], we're in a much better place because we were able to change that policy about pigeonholing kids.

Regarding policies and practices, Participant 14 asserted that “We're getting there. I mean, you know, getting rid of leveling was huge. That was, 15 years in the making, 20 years in the making. And that was huge. I mean, that, that just needed to happen.”

Participant 10 explained that practices need to change more than policies and described a vast difference between middle school practices in each grade level.

Participant 10 explained that “students have a hard time finding their footing” because of these differences. One participant noted that the sixth grade is highly “team-oriented” compared to other grades. Another participant noted that while differences between grade

levels is “appropriate to some extent,” the significant variations in practices cause students to struggle.

Participants indicated that many policies and practices are very “junior high” and that the district needed to move toward policies and practices that support the middle school concept. Participant 7 reflected on the district's initial transition to middle schools, recalling: “That's really when some of these big issues should have been addressed. Like we shouldn't have been doing homogeneous grouping 20 years later. Yeah, we should have integrated instruction. We should have teams that work together.” Participant 6 described changes over the years, “There's a lot of work to be done. But we've made small strides...when I came here, I don't think teaming was what it is now...there've definitely been huge gains.” Participant 8 explained that the policies and practices in the middle schools in the WSD did not align with the middle school concept because the district was just doing things “the way it's always been done” and that “it's easier for us to just keep doing it even though that's not what we need to do if we're going to be real middle schools.” With the recent change in the policy on leveling, Participant 14 remains hopeful that “more policies will follow in that direction.”

### **Theme 5: The Need for Strong Leadership**

About 90% of participants agreed that effective adoption of the middle school concept relies heavily on strong leadership. Participant 4 stated, “I just don't think there's administrative leaders that understand the middle school concept.” Participant 5 reiterated this saying, “We've got Administrators that don't really understand what middle school is supposed to be.” Participant 1 expressed, “I think building leaders need to understand

more,” and Participant 2 called for “actual leadership.” More than half of the participants felt that administrative leaders lacked understanding of the middle school concept. One participant noted, “We jump on any bandwagon that drives by without any support.” Participant 5 stressed that “a lack of leadership and knowledge by our leaders about what a middle school concept is” poses a barrier for the WSD moving forward with the middle school concept. Participant 5 indicated that current leaders lacked knowledge about the middle school concept, from building leadership to district leadership to state-level leadership. Participant 5 describes the affect that has on teachers,

It's very hard to be a person on the bottom, trying to change, make it happen when people who are above you and get to make decisions above you aren't making decisions that would be in sync with what you need to provide for students.

Another participant even shared that the district’s board of education is “ill informed” and described how they were concerned about the future of the district.

One third of the participants specifically mentioned two previous middle school principals that were knowledgeable and supportive of the middle school concept. At one school, teachers in the building and throughout the district highly regarded a former principal as a highly effective middle-level leader. Participant 13 stated, “We had, I think, probably the best principal to teach us how to be middle school teachers.” Other participants who worked with that principal described how the principal provided training and support to help teachers shift their mindsets from a junior high model to a middle school model. Participant 13 described the principal’s leadership when the district first transitioned from junior high schools to middle schools:

We were all junior high teachers. That's all we had ever done. It's all we had ever had. And then he told us when I would say to him, we would go in either as a team or with another teacher and say, well, we want to do this, or why can't we do that? And in the most Socratic method possible, he would say, what's best for the kid? And so, then that makes you think differently. It's not what's best for me. It's what's best for this child who sits in front of me.

One of the other middle schools in the WSD was not as successful despite having a leader knowledgeable in the middle school concept. Participant 6 shared,

We had a principal that was hired who was extremely middle school, and really started the advisory and wanted to get rid of bells and, like some small steps into middle school concept, but there was a very, there's a big pushback in my school.

Teachers were very upset, and he ended up leaving after a year.

Overall, participants did not feel their current leaders had a strong understanding of the middle school concept. At one school, a participant described that the staff was working to align their leader with the middle-level philosophy. At another school, a teacher advocated that school leaders should have developed their skills in the 20 years since the district transitioned from junior high schools. Participant 5 stated,

If you've been here for many years, and you were here when they transitioned from junior high to middle school, as an administrator, then you should have gotten your PD in the middle school area, at least at some point.

Even though the WSD had transitioned from junior highs to middle school nearly 2 decades before the interview, one participant shared that their current principal had

explained to them, upon being hired 2 years prior, that the school was “moving from junior high to middle school concept.”

All participants expressed disappointment with the level of support for the middle school concept. One participant described their disappointment as “very” significant, while another characterized the support as “deplorable.” When asked about supports, Participant 3 exclaimed, “This is where we have our problem.” Participant 5 shared, “I feel disheartened. Because I know how beautiful it can be.” Participant 10 also noted disappointment with leadership support:

I think we need more support. I think it's one of those things that, I think for the most part, there is at least a groundswell of people who are very supportive of the middle school concept. But from top down - it's not that there's not the idea that it's good - it's just there's no implementation that's school wide or district wide. Participant 15 explained, “We need leadership that is able to view and handle everything. And if you're not, then you've got to get the people in place that are.”

Participants expressed the need for leadership and a vision for middle schools in the WSD. One participant stated, “My administrator does not have more knowledge over middle school than I have.” Participant 12 expressed frustration with the support in shifting to true middle schools: “We're going to change it, but nobody's given us any direction or any roadmaps that we're going to need to follow to help us be successful in this new model.” Participant 4 stated, “I believe our middle school teachers and our middle school leaders should come from programs that train them in the middle school idea.” Participant 4 suggested:

If I were an administrative central office, I would start looking for people that come out of middle school programs, you know, teacher training programs. And I would try to get as many of that in. And I would look towards hiring, at the middle level, people at the administrative level with true middle school experience. And I would look at bringing them in from outside.

Participants called for leaders who have a “consistent vision with goals” and are “willing to sit down and hash things out.” Participant 4 called for improvement in leadership, claiming, “There's a lot of power in your administrators steering people in the right direction.”

#### **Theme 6: The Need for Focused and Ongoing Professional Development**

Only two of the 15 participants received training from the WSD specific to the middle school concept. Both participants explained that the training occurred during the shift from junior high to middle school nearly 20 years prior. When that shift occurred, three other participants were employed by the WSD and working at the middle school level. These three participants indicated that they did not receive any specific training on the middle school concept from the district. Two of these participants shared that they had sought training themselves. Of the remaining participants, one received an abundance of training outside the WSD and the rest received either no training, were asked to read AMLE's This We Believe as their only training, they sought middle-level PD on their own, or they were sent one time to a conference. All participants expressed frustration with the lack of training and support.



Many participants expressed that the district does not offer PD specific to the middle schools. One participant, who had been in the WSD at the middle level for over 5 years, stated “The only thing I can specifically remember that was school wide is a reread of This We Believe.” Several participants explained that over the past 3 years, PD had primarily focused on ELL, and that during the COVID-19 pandemic, PD was not prioritized. Participant 3 explained, “We talked about differentiated instruction in some isolated kinds of things we can do, but I don't know how much big picture stuff we've done.” Participant 6 stated that PD opportunities on the middle school concept are “nonexistent.” Participant 9 felt that the district had “fabulous” PD offerings during the previous school year, but none were specifically geared towards the middle school concept. Participant 2 reiterated this, “I don't see that any, that the professional development has had anything to do with the middle school model.” Participant 14 stated, “I don't think there really is much on the middle school concept.” Participant 4 shared, “I'm not really sure I'm aware of any [PD]. We've been focused on ELL and before there's been a big push on, you know, departments.” Participant 6 shared the following when asked if PD was effective in addressing the middle school concept:

I almost feel like it's almost obsolete right now. There really is none. There should be. I don't feel it's a focus. I mean, they say it's a focus, but it's not. It's more committee driven rather than PD - like there's committees that are trying to work towards it, but there's not a lot of PD and that's what we really need for everybody to be on board and understand it.

Participant 8 reflected on PD offerings saying, “They are not effective at all because they have nothing to do with middle school. Because middle school is neglected.” Participant 12 shared, “We haven't really had anything to support it. I mean, I've read some articles and stuff, but nothing solid on what should be implemented.” Participant 10 also shared that the current PD does not address the middle school concept, and Participant 13 described the PD offerings as “reactive, not proactive.”

When asked for suggestions for improvements or changes to enhance the application of the middle school concept in the WSD, Participant 2 suggested,

We would need a definition. We would need an outline, a model, we would need some resources, and then we would need, you know, formatives. How are we doing? How's this working? Have you tried this? What happened with this? What was really good about something? So just like with our students, we want to see them grow towards proficiency, and then we should have that same courtesy.

Participant 6 stated,

We've been talking about it for long enough, I feel, and there are some people that it needs to be like, okay, enough. This is what we're going to do. And if you don't like it, I'm sorry, then you might want to find a junior high to go to. But I do think it comes to a point in time where if we know this is what's best for kids, all the research is saying, this is what's best for kids, why are we not doing what's best for kids?

Participant 8 called for middle school PD on what the middle school concept actually is, stating,

And we all need to be on the same page about what this middle school is going to look like. And then we need the time to be able to meet with our teams and colleagues and figure out how we can do that within the parameters that we have, whether it be the building or the space or our team, within the frameworks that we're given.

Participant 13 also emphasized the need for middle-level PD, and suggested,

There has to be, I believe, a joint effort of the leaders of the building demonstrating actively that they understand and appreciate the philosophy of middle school education. They have to exemplify it in everything that they do.

And they have to escort all those who are not implementing it.

Several participants mentioned professional learning communities (PLCs) as a forum for PD on the middle school concept. Participant 11 proposed implementing short training sessions during PLCs and mandatory book studies as ways to prioritize and invest in valuable PD activities. Participant 4 suggested hiring administrators and teachers who are trained to teach at the middle level. Participants 5, 7, and 9 suggested collaboration between team and cross-team teachers, across schools, and across grade levels to support the middle school concept. Participant 15 suggested the need to improve partnership with families.

Seven participants suggested visiting effective middle schools or bringing in people to share their experiences at effective middle schools. Participant 1 shared,

I myself would love to see, to go visit middle schools who do it well. So, perhaps if there were ways for like an entire team for a day, to go see a highly effective

team somewhere that they could visit for the day. I think some people, if they haven't seen it work, they can continue to say it's not going to work.

Participant 10 also suggested learning from successful middle schools,

I don't know if there if there are school districts who have transitioned over from more of a junior high to a middle school concept, and having, for lack of a better term, testimonials or people to just come in and talk about some of the struggles that they had and how they overcame - just to give us a model of how to go from being the middle school model in name to one in actuality.

Participant 6 also discussed the need for the WSD to hear from people outside the district, “I think people coming in to talk to people about different components of being a middle school. I think, you know, people need to hear about it more.” Participant 12 feels that since there are restructuring things happening at the middle level in the WSD, now is the time for the WSD to create a plan for change. Participant 12 stated,

They should lay out some understanding and some guidelines and put in some PD development prior to school starting to help us all understand - or even that couple 1st couple weeks so that we can get some understanding. Because I think people aren't all on the same page. Um, we might not even be on the same book.

Participants showed interest in a variety of PD format to support teachers and administrators in applying the middle school formats. Three participants were opposed to online formats, while two others supported it. Participants also suggested workshops, PLCs, monthly early release days, and summer workshops to support middle level education.

The two formats most frequently suggested by participants were formats that were collaborative and formats that included a cycle of feedback. Participant 2 mentioned PD they had received in the last year through a partnership with an out of district resource as “invaluable” and hoped to receive training of a similar caliber on the middle school concept. Several teachers mention PLCs as great opportunities for professional growth, although Participant 14 shared that “Even our PLCs are not really middle school philosophy. It's all content driven.” Participant 15 requested to “give teachers time to do interdisciplinary work.” Participants 1, 4, and 15 also reiterated the need for cross-disciplinary work. Participant 11 suggested providing “some short spurts of training in PLC.” Two participants suggested professional visits to effective middle schools.

Seven participants emphasized that effective PD should include a cycle of feedback. Participants 1 and 2 highlighted previous PD unrelated to the middle school concept that they had received in the district that was highly effective due to the collaborative nature, the hands-on activities, and the feedback they received during it. Participant 5 declared, “I think the coaching cycle is great. I think that's probably the most effective - a coaching cycle.” Participant 5 also shared that workshops or work in PLC can be highly effective if there is “time for people to work together to create a unit or whatever, and then have the expectation that that's going to be implemented. And then you come back, and you debrief it together after everyone's done it.” Participant 12 also reiterated the effectiveness of a coaching cycle, and that effective PD needs to be “ongoing.” Participant 7 emphasized the need for PD that is thoughtfully constructed, declaring that the WSD middle schools need PD that is:

A program with a beginning, a middle and an end, like a purpose, a goal by the end of this, you'll be able to, you know, like we do with students, what it's no different. Learning is learning. You know, tell me what my target goal is.

When asked if there should be personalized or customized PD plans for teachers based on tier individual needs and experiences with the middle school concept, all participants except one strongly affirmed the necessity for such tailored approaches. The opposed participant explained, "You're not going to work in isolation. And so, your work needs to be done together." Most participants also expressed that when it comes to the middle school concept, everyone needs the same message before getting customized PD. For example, Participant 7 stated, "Everybody should have to have the same training [in the middle school concept]." Participant 5 explained that the WSD's PD plan for teachers already does this, but also shared that people should be able to choose some of their PD. Participant 5 mentioned that personalized PD could be accomplished through mentoring. Participant 4 emphasized that educators have a responsibility to stay current with PD. Participant 4 stated, "I am a professional salaried worker. It is incumbent on me to stay current in what my profession is." Participant 4 described further:

I think that everyone should have a degree of balance where an administrator says, 'I'd like you to work on this' and then you have the freedom also to explore what you know is a weakness. And then I think there needs to be an understanding that you have master teachers, you know. And...you don't have to find something wrong with every teacher, and instead have the conversation like, "So, where are you growing in your professional development?"

The overall feeling from most participants was that the PD should be differentiated for teachers to be effective.

Most participants noted that the district currently utilizes a Google Form to gather feedback on PD experiences. Participants were divided in their opinions on the effectiveness of this communication method. Two participants felt that using Google Forms provided anonymity, which allowed for honest feedback. One participant felt this way because there is “a lack of trust” in the district. Some participants felt the timing of feedback was important. One participant stated, “It shouldn't be given right at the end of the activity, because I just want to click the boxes and be done, move on with my life.” Another participant stated that teachers,

Should not fill out any surveys because we fill out surveys all the time here and they go off to the survey fairy and we never hear back again. I fill out so many surveys and I take the time and effort to put in details and then they send me another survey with the same questions.

Over half of the participants advocated for discussion during and after PD experiences. Participant 2 recommended allocating “time for people to talk” and suggested “monthly quick check-ins.” Participant 4 stated feedback should be completed through conversation:

I think when you have a team of teachers, you know, the administrators come and meet with us, it could be conversations of what did you think of it? How did that go? What would you like to see? I think that connection from either whoever's planning professional development and the teachers, it doesn't have to be a one on

one, but you can be working and talking in general with groups of people and asking, being a person that communicates that you care about what people think because you want to make things better, is always very helpful.

Participant 6 also emphasized the importance of conversation:

I think maybe even having a discussion at the end where people can share out, you know, what didn't we talk about that you'd like more as a discussion? Cause I think sometimes when people go to fill out a form or an exit ticket or whatever, to give feedback, it's, they just want to get it done. So I think allowing time at PD would be beneficial to have a conversation and not in a negative way, but like, okay, what's next steps? What did we not do enough of? What do we need more of? I think that would be pretty effective. That teachers might be able to not just be wanting to get done, but to really think about what they learned that day and what do you need more of.

Participant 10 also expressed interest in conversation as feedback suggesting meeting with “whoever puts together the PD and just having a back-and-forth kind of conversation.” Participant 8 emphasized providing feedback after teachers have had time to digest and reflect on the PD. Participant 8 stated,

Whether it's sent out in an email the following day, or we have some open response questions to give more specific feedback than the multiple-choice grid, it needs to be easy enough that the staff will buy into it and do it, but thorough enough that we can actually get some useful feedback out of it.



Overall, participants communicated that feedback is valuable. Participant 3 highlighted, “I think people will give their feedback if they felt like their voice was being heard.”

### **Evidence of Trustworthiness**

Ensuring trustworthiness is essential in qualitative research to establish credibility (Merriam & Tisdell, 2016). This study employed specific strategies to enhance credibility, including demonstrating evidence of credibility, transferability, dependability, and confirmability, thereby increasing the validity of the research. The strategies used in this study to ensure credibility were an audit trail, member checks, a thick description of the results, and a reflexive journal.

#### **Credibility**

Member checking was used to uphold the credibility of the study. Member checks allowed participants to provide feedback on the emergent themes. This process enhances the trustworthiness and rigor of the research study (Merriam & Tisdell, 2016).

#### **Transferability**

External validity is established when research findings can be applied in various situations (Merriam & Tisdell, 2016). To establish transferability in this study, I provided thick description of the setting, participants, and findings. The thick description offered specific details that allowed me to make connections between the middle school concept and the participants at the study site. This rich, thick description will also allow educators in other middle schools to determine if their school matches the study site enough to transfer the findings to their schools (Merriam & Tisdell, 2016).

**Dependability**

In qualitative research, dependability is essential to maintain consistent research methods across different researchers and studies (Merriam & Tisdell, 2016). Ensuring dependability is analogous to upholding internal validity in quantitative research, as both aim to ensure that results are consistent and accurate through rigorous methodology and data analysis (Merriam & Tisdell, 2016). I made use of an audit trail to establish dependability. These detailed records document my decision-making process. I documented the steps in my research, and the decisions I made throughout the study. This documentation includes my experiences with the interview process and the data analysis conducted through coding and identifying emerging themes.

**Confirmability**

In a qualitative study, the findings must be free from researcher bias and enable other researchers to arrive at similar conclusions using the same methods and analysis (Burkholder et al., 2020). I maintained a reflexive journal to establish confirmability in my qualitative study. Throughout the research process, I engaged in reflective analysis to critically examine my role, assumptions, and biases.

**Summary**

In this basic qualitative study, six themes were identified from the data collected during face-to-face interviews, shedding light on recognizing middle school as a unique stage, emphasis on a collective understanding of the middle school concept, challenges in overcoming teacher resistance in implementing the middle school concept, barriers posed by district policies and practices, the importance of strong leadership, and the need for

ongoing PD with feedback. Chapter 4 details the comprehensive data collection process and analysis, participant details, the research setting, data collection methods, findings, and the assurance of trustworthiness. Chapter 5 will delve into the findings in depth, offering interpretations and discussing the study's limitations. The study's implications for practice and suggestions for future research will also be explored.

## Chapter 5: Discussion, Conclusions, and Recommendations

This study was conducted to explore teachers' perceptions of the middle school concept and their needs for additional support in its application, addressing the common challenges teachers face in effectively implementing the middle school concept. Chapter 5 will explore the interpretation of findings, drawing comparisons with relevant literature on the middle school concept. Additionally, this chapter will critically address study limitations, offer recommendations based on the findings, and explore the implications for driving positive social change in middle-level education.

### **Interpretation of the Findings**

The RQs developed for this study were intended to explore a potential gap in practice between the essential attributes of successful middle schools and their actual implementation in middle school settings. These findings were then utilized to address and respond to the RQs. The results center on the following six identified themes:

- the recognition of middle school as a unique developmental stage where students benefit from teaming (Theme 1);
- the importance of a collective understanding of the middle school concept (Theme 2);
- the necessity of overcoming teacher resistance to implementation (Theme 3);
- school policies and practices that hinder educators' understanding and implementation of the middle school concept (Theme 4);
- the need for strong leadership to create a supportive environment, provide guidance, and overcome implementation challenges (Theme 5); and

- the need for focused PD accompanied by ongoing opportunities for growth and feedback to effectively implement the middle school concept (Theme 6).

I examined teachers' perceptions of the middle school concept and their identified needs for additional support in its application. This study was grounded in the middle school concept as articulated by AMLE (Bishop & Harrison, 2021). Middle-level educators are crucial in delivering developmentally appropriate educational experiences for young adolescents. The middle school concept emphasizes a student-centered approach that addresses the unique developmental needs of adolescents (Bishop & Harrison, 2021; National Middle School Association, 2010). According to AMLE, successful middle schools exhibit essential attributes such as responsiveness, challenge, empowerment, equity, and engagement that contribute to student achievement (Bishop & Harrison, 2021). AMLE's middle school philosophy emphasizes the interdependency of these attributes for achieving success in meeting the needs of young adolescents (Bishop & Harrison, 2021).

### **Adolescent Development Focus**

The consensus among educators was that the middle school years represent a unique developmental stage, and the practice of teaming at this level is seen as supportive of this unique developmental phase. These findings were consistent with AMLE (Bishop & Harrison, 2021) and Rheaume et al. (2021), who established that the unique development stage of young adolescents should guide all decisions at the middle level. Participants' perspectives echoed findings from Alverson et al. (2021) and Jansen & Kiefer (2020), highlighting a shared understanding of the importance of developmentally

responsive middle schools. Participants' beliefs that the middle school years are developmentally distinct from both elementary and high school corroborated the findings of Smith et al. (2020), who emphasized this distinction in their study. The value placed on adolescent development by participants confirmed the results of Alverson et al. (2021) and Rheaume et al. (2021), reflecting shared sentiments about the significance of this unique developmental stage. Furthermore, valuing young adolescents is a key characteristic of successful middle schools promoted by AMLE (Bishop & Harrison, 2021).

Participants highlighted the importance of promoting a sense of belonging and value among middle school students. These findings were in line with Andrews (2023) who emphasized that a sense of belonging is crucial for fostering a strong sense of self. Additionally, participants emphasized that relationship building is a key method for establishing a sense of belonging and is a critical component of successful middle-level education. According to AMLE, creating a welcoming and inclusive environment is another key characteristic of a successful middle school (Bishop & Harrison, 2021). Research by Zysberg and Schwabsky (2020) and Scales et al. (2020) supported that of AMLE (Bishop & Harrison, 2021), affirming that positive relationships and a sense of belonging contribute to student self-efficacy and enhance student success.

Teaming is an organizational structure distinctive to middle school that creates a sense of belonging for students, builds relationships among students and teachers, and facilitates meaningful learning experiences (Bishop & Harrison, 2021). Every participant recognized teaming as a critical component to successful middle schools, aligning with

the views of Berckemeyer (2022), Bishop & Harrison (2021), and DiCicco and Alverson (2023). These researchers argued that teaming allows teachers to develop effective relationships with students that enhance teaching and learning. My findings also align with Rheaume (2022) and Alverson et al. (2021), who similarly emphasized the value of teaming among participants.

Participants noted that teams in the WSD are cross-disciplinary by core contents. Teaming is intended to support students developmentally and it is also a practice intended to foster interdisciplinary teaching and learning (Bishop & Harrison, 2021). Participants discussed that inter-disciplinary teaching and learning does is inconsistently implemented. This is in line with research by Alverson et al. (2021), DiCicco and Alverson (2023), and Rheaume (2022), which also indicates variability in the implementation of the interdisciplinary aspects of teaming in middle schools. Participants felt strongly that all teachers need to understand what teaming is all about, and some noted that unified arts and other cross-team teachers do not benefit from the teaming structure. Berckemeyer (2022) emphasized the importance of aligning all stakeholders with teaming practices, a sentiment affirmed by participants who expressed a desire to enhance teaming through PD, which will be further examined in a subsequent section. The participants' acknowledgement of the need for improvement within the existent teaming structure in the WSD reflects the dedication of the educators in the district. Participants recognized the transformative potential of teaming, as Berckemeyer (2022) advocated. They expressed aspirations to get all educators on the same page with

teaming, engage in interdisciplinary teaching and learning, and cultivate a community of professionals committed to continuous learning and growth.

### **Collective Understanding**

All participants emphasized the need for consistency in how the middle school concept is understood in the district, stressing the importance of establishing a shared and coherent understanding across all schools to improve overall effectiveness. The success of the middle school concept depends on its comprehensive and complete implementation, including all essential elements without selective application (Bishop & Harrison, 2021; George & Alexander, 2003; Jackson et al., 2000). The only collective understanding shared by all participants was that effective middle schools are responsive to the unique developmental needs of middle schoolers, and that organizing students into teams fosters meaningful relationships and enhances learning. This is consistent with Alverson et al. (2021) and Rheume (2022), who found that the teaming structure is often in place in middle schools but often fails to effectively foster purposeful learning.

Another essential attribute of the middle school concept is that the middle school experience must be challenging, cultivating a culture of high expectations for all stakeholders in the educational setting (Bishop & Harrison, 2021). Most participants discussed the importance of engaging curricula; however, they predominately discussed aspects that were lacking. Specifically, participants emphasized the need for integrated curriculum and opportunities for PBL. Research conducted by Bousalis & Furner (2020), Cassidy & Puttick (2022), and Gardner & Tillotson (2020), supports the integration of



curriculum at the middle level to not only increase academic success but also improves student engagement.

Empowering students with agency in their own learning and creating an engaging environment are also essential attributes of the middle school concept (Bishop & Harrison, 2021). Less than half of participants specifically discussed these attributes. Şuteu (2021) affirms the importance of students taking active roles in their own learning. Engaging parents and families supports students in all aspects of middle school (Bishop & Harrison, 2021). Only three participants mentioned parent and family involvement, which is consistent with research conducted by Alverson et al. (2021), showing that relationships with parents and families are supported approximately half the time.

An advisory program is a middle school structure in which each student is paired with an adult advisor tasked with supporting their academic development and emotional well-being (Bishop & Harrison, 2021). All participants who discussed advisory expressed positive views and valued its importance. These findings were consistent with research by Rheume (2022) which similarly highlighted the importance of an advisory program in middle school. Participants noted that the focus of advisory has varied, but SEL is often integrated into advisory. This point is supported by the research of Main and Whatman (2023), who advocated for developing social emotional skills to improve student engagement, academic achievement, and future success. Research by Bishop (2023), Bishop and Harrison (2021), Main and Whatman (2023), and Strahan and Poteat (2020) supports the integration of SEL with a focus on diversity and equity. However, participants in this study did not support this aspect.

Participants had strong opinions concerning the grouping of students for instructional purposes. Research by Alverson et al. (2021), Bishop and Harrison (2021), and White (2021) suggested that even though leveling contradicts the middle school concept, it remains prevalent in middle schools. The majority of participants was in favor of heterogeneous grouping and flexible grouping, while one participant favored ability grouping. Participants explained that the elimination of leveling was a recent policy change. This change is supported by the research of Alverson et al. (2021), Benson et al. (2020), Fewell et al. (2021), Roo et al. (2020), and White (2021), all highlighted the point that ability grouping is not in line with the middle school concept by perpetuating inequitable learning opportunities and reinforcing social injustice. An equitable middle school experience is also an essential attribute of successful middle schools (Bishop & Harrison, 2021). Participants did feel strongly that differentiated instruction was necessary to meet the needs of all students, but felt it was not implemented successfully. White's research (2021) confirms the need for best practices like differentiation are not implemented in low level classes.

Flexible scheduling supports the tenets of the middle school concept (Bishop & Harrison, 2021; Perez, 2022). The middle schools in the WSD use a traditional 7-period schedule, consistent with most middle schools studied by Alverson et al. (2021). Participants emphasized that the traditional schedule presents an obstacle to fully embracing the middle school concept. This aligns with research conducted by Alverson et al. (2021), Bishop and Harrison (2021), Perez (2022), and Rheaume (2022), who

similarly highlighted how traditional scheduling practices can hinder middle school philosophy.

Participants in this study discussed various aspects of the middle school concept, highlighting a collective understanding that middle-level education must be responsive. While not all of the essential attributes of effective middle schools were discussed collectively, each attribute was addressed in some form across the interviews. These findings are consistent with research conducted by Alverson et al. (2021), DiCicco and Alverson (2023), ND Faulkner et al. (2023, who found that a disconnect between middle school educators' perceptions of best practices and their actual implementation. Efforts to achieve a collective understanding of the middle school concept would contribute to positive change within the WSD, aligning with research by McChesney and Cross (2023), emphasizing the critical importance of consistency and collective understanding in educational change efforts.

### **Obstacles to Effective Implementation**

Participants emphasized that securing teacher buy-in could be a major challenge in fully implementing the middle school concept. Components of teacher buy-in encompassed comprehension gaps related to the middle school concept, misconceptions about teaming, teacher mindset, preparation, leadership, and PD. AMLE (Bishop & Harrison, 2021) affirms these concerns, emphasizing the vital role of a shared vision by all members of a school community. Research by Alverson et al. (2021) and Rheame (2022) suggested that both the understanding and implementation of the attributes of the

middle school concept vary across middle schools, affirming the participants' concerns in this study.

The climate and culture of a school significantly impact student success (Bishop & Harrison, 2021; Dasgupta et al., 2022; McChesney & Cross, 2023; Zysberg & Schwabsky, 2020). Participants indicated that middle-level teachers in the WSD do not have the same mindset or attitudes toward middle-level education. Research shows that collective teacher efficacy significantly boosts student learning outcomes (Anderson et al., 2023; Bryce et al., 2022; Daniels, 2022; Hattie, 2023). In addition, collaboratively developing a shared vision and a collective understanding of the middle school concept leads to effective middle schools (Demarco & Gutmore, 2021; Faulkner et al., 2023; Ruppert, 2020; Scales et al., 2020; Walls, 2021). The findings in this study concerning teacher mindset indicate a need for creating a collective vision across all three middle schools (Anderson et al., 2023; Demarco & Gutmore, 2021; Faulkner et al., 2023; Ruppert, 2020; Scales et al., 2020; Walls, 2021).

Participants working in the WSD when the schools shifted from junior high to middle schools expressed frustration with teachers and leaders who have not embraced the middle school concept. According to AMLE (Bishop & Harrison, 2021), the most effective approach to meeting the needs of young adolescents is by having educators specifically trained to work with this age group. Most middle-level teachers in the WSD are trained to teach at the elementary or high school levels, highlighting a gap in specialized training for working with young adolescents. This observation aligns with

research by Caskey and Swanson (2023), emphasizing the need for targeted PD. This topic will be discussed in more detail in a subsequent section.

Participants highlighted a barrier to change at the middle level stemming from a mixed staff composition. This included traditional educators aligned with the junior high school model and educators with more contemporary perspectives in line with the middle school concept. One participant shared that although they had a leader well versed in the middle school concept, the resistance from traditionally minded staff forced this leader out of their school. Studies on the brain development of young adolescents highlight the necessity to revise our teaching approaches at the middle school level to be in line with the principles of the middle school concept (Bishop & Harrison, 2021; Hurd, 2022; Jansen & Kiefer, 2020). Additional research on equitable and culturally relevant and sustaining pedagogy supports the essential attributes and characteristics of the middle school concept (Bishop & Harrison, 2021; Hurd, 2022). Steps will need to be taken in the WSD to address the mindsets of traditional educators to improve collective teacher efficacy and foster beliefs and practices that prioritize developmentally and culturally responsive pedagogies (Anderson et al., 2023; Bishop & Harrison, 2021; Bryce et al., 2022; Daniels, 2022; Hattie, 2023).

Policies and practices at the middle level in the WSD were also identified as obstacles. The consensus among participants was that certain policies and practices serve as barriers to fully embracing the middle school concept. For instance, participants discussed that a policy that required leveling in the WSD middle schools was recently changed. This practice had been written into the WSD middle school policy despite a

wealth of research highlighting the negative impact of ability grouping (Fleischmann et al., 2021; Tunç & Ülker, 2020). Some participants referred to a specific group of traditionally minded teachers who consistently opposed changing this policy. It would be best practice if the WSD established a clear vision for middle-level education across all three middle schools and communicated that vision to all stakeholders, including the traditionally minded teachers (Demarco & Gutmore, 2021; Ruppert, 2020; Scales et al., 2020; Walls, 2021).

Participants also acknowledged that the traditional grading practices at the middle level were inconsistent not only with the middle school concept but also with the standards and competency based grading at the district's elementary and high school levels. Virtue and Pinter's research (2023) supports a shift from traditional assessment and grading practices to authentic and standards-based practices. Overall, the participants emphasized that the WSD's implementation of practices supporting the middle school concept had been inconsistent over the last 20 years. Research by Alverson et al. (2021), Faulkner et al. (2023), and Rheume (2022) affirms that middle school leaders do not implement the middle school concept with fidelity.

### **Leadership Impact**

According to participants, successful implementation of the middle school concept hinges greatly on strong leadership. Exemplary middle-level leaders are dedicated to the essential attributes and characteristics of the middle school concept (Bishop & Harrison, 2021; Gray, 2023; Rheume, 2022). One of the WSD middle schools had a school principal who was knowledgeable about the middle school concept.

During his leadership, the essential attributes of effective middle schools drove all decision making. As a result, participants at that school observed the positive impact of the middle school concept on students and staff performance. This observation is supported by research from AMLE (Bishop & Harrison, 2021) along with research conducted by Gray (2023) and Rheume et al. (2021) which highlight the importance of developmentally responsive middle-level leadership.

Participants in this study expressed significant concerns about their leaders' limited understanding of the middle school concept. Without a clear understanding, principals cannot drive a school's commitment to developmentally and culturally responsive middle schools (Bishop & Harrison, 2021; Rheume, 2022; Ruppert, 2020). Research by McChesney and Cross (2023) suggested that the ability of leaders to set the vision for their school directly impacts the climate and culture of a school, ultimately shaping the trajectory of educational change. The dissatisfaction with leadership, at both the building and district level, in effectively transitioning the WSD middle schools from the junior high mindset over the past 20 years was clearly articulated by all participants with over 5 years in the district. As previously discussed, the climate and culture of a district impact all aspects of a school community (Bishop & Harrison, 2021; Dasgupta et al., 2022; McChesney & Cross, 2023; Zysberg & Schwabsky, 2020). Leaders are responsible for fostering and sustaining a positive school culture (Bishop & Harrison, 2021; Rheume, 2022 ). Research by Rheume et al. (2021) concluded that responsive middle-level leaders create a culture of collaboration and continuous improvement.

Effective middle school leaders must continue to enhance their own professional knowledge (Rheaume et al., 2021). Participants expressed strong sentiments that their leaders had not fulfilled that expectation. Like teachers, school administrators need job embedded training to increase their leadership skills (Caskey & Swanson, 2023; Jimerson & Quebec Fuentes, 2020; Swanson & Caskey, 2022). Continuous improvement in leadership is essential for leading change, a demand that participants consistently emphasized throughout the interviews (Meyers et al., 2021). Gray's research (2023) supports my findings, highlighting that effective leaders demonstrate leadership through action.

The ability of leaders to demonstrate "courage and collaboration" is a characteristic of successful middle schools (Bishop & Harrison, 2021, p. 48). According to participant data, PLCs are in place in the WSD, indicating that leadership values collaboration (Many et al., 2020). Additionally, teachers have various leadership opportunities in the district, including participation in steering committees. This is supported by Bento et al. (2023) and Liu et al. (2023), whose research supports distributive leadership. However, participants also noted a significant lack of support from leadership. The research by Ryu et al. (2022) on caring leadership emphasized the importance of leaders providing support to shape collaboration and problem-solving. Additionally, caring leadership can address parent and family involvement and culturally relevant teaching, both underrepresented areas in this study's data (Ryu et al., 2022).



## **Professional Development**

Despite AMLE's emphasis on teachers specifically trained to work with young adolescents, most middle-level educators lack this specialized training (Caskey & Swanson, 2023). In light of this, middle-level educators require job-embedded PD (Bishop & Harrison, 2021; Caskey & Swanson, 2023; Hale, 2020; Swanson & Caskey, 2022). The participants in this study reported a crucial need for targeted PD tailored to address the unique challenges and demands faced by middle-level educators. Most participants had received no training on the middle school concept from the WSD, and those that had received it early 20 years prior.

PLCs are established in the WSD middle schools. However, according to Many et al. (2020), teachers need continuous support to enhance PLC practices and foster high levels of learning. The earlier discussion about the lack of leadership support suggests that this necessary improvement is not currently occurring. A culture of learning and improvement must be established for PD to be effective (Jurs et al., 2023). Basma and Savage's research (2023) indicates that best practices in PD are inconsistently implemented, affirming that the situation in the WSD is widespread.

Participants suggested a variety of PD formats for improving the district's middle schools, as well as personalized PD. Existing research also advocates for a variety of PD strategies (Basma & Savage, 2023, Jurs et al., 2023; Hale, 2020; Stevens et al., 2022). Participants placed value on two types of feedback: a cycle of feedback connected to learning and feedback aimed at improving professional learning opportunities. The work of Many et al. (2020) affirms that feedback is a crucial element in developing habits of

professional practice geared towards improving teaching and learning in schools.

Additionally, Bryce et al. (2022) advocated for a variety of PD to promote collective teacher efficacy. Other researchers (Demarco & Gutmore, 2021; Ruppert, 2020; Scales et al., 2020; Walls, 2021) have also called for collaborative decision-making practices in educational settings.

McChesney and Cross (2023) state that school climate and culture directly impact teachers' professional learning. Throughout the interviews, participants highlighted various instances where the climate and culture in the WSD middle schools hindered the implementation of the middle school concept. Ryu et al. (2022) advocate for developing schools that create supportive environments where everyone learns and improves together. The themes developed from the interview data in this study indicate that the participants clearly understand what needs to happen for successful implementation of the middle school concept. These insights underscore the need for targeted PD to address challenges and cultivate an environment that will allow the middle school concept to thrive (Bishop & Harrison, 2021).

### **Limitations of the Study**

Qualitative data often consist of narrative feedback gathered from interviews, which may introduce certain limitations regarding subjectivity, variability, and the interpretive nature of the data (Merriam & Tisdell, 2016). To address researcher bias, I maintained transparency by including all information without distorting responses to align with anticipated results. Throughout the interviews, I objectively interpreted data, ensuring that my personal influence did not impact the analysis of participant responses.

In addition, I assured participants that the interviews would be confidential and clarified that, in my role as an instructional coach, I do not hold a position of authority. Bias reduction strategies included member checks, thorough review of recorded sessions, strict adherence to interview protocols, and ensuring consistency and neutrality in data collection.

The number of participants, their level of experience, and the diversity of settings in this study contribute to potential limitations. This study required that participants have at least 1 year of experience teaching middle school and some knowledge of the middle school concept. The participants' teaching experience in this study varied widely, ranging from 2 years to over 20 years. Participants included both male and female educators representing Grades 6–8 in all core content areas, special educators, reading specialists, and unified arts.

Participants also exhibited varying degrees of experience and with the middle school concept. Only two participants from one of the middle schools received training from the district under study related to the middle school concept, and that training occurred nearly 20 years ago. Participants in the other two middle schools in the WSD had inconsistent PD experiences related to the middle school concept. The limited and varied training experiences among participants in the study, including a lack of consistent district-specific training on the middle school concept and reliance on self-directed or external PD, may limit transferring findings to settings with different training approaches.

### **Recommendations**

The findings of my study indicate a need for additional research on teachers' perceptions of the middle school concept and strategies to support its full implementation. AMLE asserts that effective middle schools' essential attributes and characteristics must be "implemented in concert" (Bishop & Harrison, 2021, p. 6). Research indicates inconsistent application of the middle school concept (Alverson et al., 2021; Faulkner et al., 2023; Rheume, 2022). Based on the findings, data analysis, and existing literature, I propose the need for additional research within this study's domain. The following recommendations outline areas for further investigation:

This study was limited to middle school educators in one urban school district consisting of three middle schools. It is recommended that studies be conducted in a variety of diverse middle schools across the country to explore teachers' perceptions of the middle school concept and their specific needs for additional support in its application. Researchers should prioritize comparative studies across diverse settings, including urban, suburban, and rural middle schools. By exploring variations in teachers' and administrators' perceptions, implementation practices, and support needs across different contexts, researchers can gain valuable insights into effective strategies for applying the middle school concept in various educational environments.

### **Implications**

The purpose of this qualitative study was to explore teachers' perceptions of the middle school concept and their needs for additional support in its application. Data collected through face-to-face interviews enabled me to investigate the three RQs posed

in this study. Findings from this study can contribute to the current literature on the middle school concept. This study's findings revealed strengths and areas for improvement in understanding and applying the middle school concept at the research site. This study's findings provide actionable insights that can initiate discussions and initiatives to improve the middle school experience for students and educators, contributing to ongoing efforts for positive social change in education.

The initial element of social change focuses on strengthening collaborative practices and fostering a collective understanding. AMLE outlined the middle school concept through essential attributes and key characteristics that must be implemented collectively. The district under study has not implemented all aspects of the middle school concept, nor do its teachers and leaders share a common vision. By collaboratively creating a unified vision for middle-level education in the WSD and developing a comprehensive improvement plan, educators could transform the middle school experience in their district. Data from this study indicate that educators understand what is best for young adolescents, but face obstacles when implementing these concepts. If all middle schools adopt AMLE's framework and implement it with fidelity, a comprehensive view of the middle school concept could be examined and lead to significant improvements in middle-level education.

The second pivotal element of social change centers around advocating for supportive leadership and policy reform. The findings of this study indicate that ineffective leadership along with policies and practices that do not align with the middle school concept impede its implementation. Leaders must work to remove barriers faced

by teachers to incorporate best practices in middle-level education. By improving middle-level leadership, the implementation of the middle school concept could be more holistic, allowing future research to focus on the aspects that have the greatest impact.

Social change is facilitated by investing in PD and continuous growth. Ideally, the WSD will develop a plan for ongoing PD, including personalized learning pathways and regular cycles of feedback. Educators would benefit from a variety of opportunities to strengthen their pedagogy, such as mentorship programs, PLCs, school visits, workshops, and access to resources tailored to middle-level education. This study aims to inform and influence PD initiatives specific to middle-level education.

### **Conclusion**

The purpose of this basic qualitative study was to explore teachers' perceptions of the middle school concept and their needs for additional support applying it. Results illustrated that teachers in the WSD are committed to providing students with a middle school experience that honors adolescent development ensuring it is both challenging and engaging. Analysis of teachers' perceptions suggested a need for a common vision for middle-level education and a comprehensive understanding of the middle school concept. This study revealed significant barriers hindering the implementation of the middle school concept, including navigating challenges related to teacher resistance, policies and practices, leadership, and PD. Moving forward, collaborative efforts among school and district leadership are imperative to establish a clear vision for middle-level education and to eliminate these barriers. An actionable improvement plan should be developed to

address these challenges and support teachers in the implementing the middle school concept.

The nature of this study was grounded in the middle school concept as promoted by AMLE, which emphasizes the unique developmental stage of middle school students. However, navigating the challenges identified in this study remains essential for significant improvements in middle-level education. The findings of this study highlight multiple impacts of social change, emphasizing the critical importance of holistic and coordinated efforts to enhance middle-level education. Participant 1 articulated the essence of this study with the statement: “People can recover from a bad middle school experience, but if they have a great middle school experience, the sky's the limit, right?”

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## Appendix A: Invitation Email

There is a new study about the middle school concept that could help teachers and education leaders better understand the benefits and challenges of the middle school concepts. For this study, you are invited to describe your experiences teaching at the middle level.

### **About the study:**

- One 30-60 minute in person interview that will be audio-recorded (no videorecording).
- You will receive a \$15 Visa gift card as a thank you.
- To protect your privacy, the published study will not share any names or details that identify you.

### **Volunteers must meet these requirements:**

- Middle school teacher with at least 1 year teaching experience.
- Has some understanding of the middle school concept.

This interview is part of the doctoral study for Carri Burns, a doctoral student at Walden University. Interviews will be scheduled at the convenience of participants' availability.

Please reach out to [email address redacted] to let me know of your interest. You are welcome to forward this invitation to others who might be interested.

## Appendix B: Research and Interview Questions

Research Question 1: What are teachers' perceptions of their knowledge about and application of the middle school concept in the middle schools in the Woodland School District?

1. How would you describe the middle school concept as it applies to education?
2. What components do you feel constitute a successful middle school?
3. How do you integrate the middle school concept into your teaching practices?
4. In what ways has your knowledge of the middle school concept evolved over the course of your teaching career?
5. Are there challenges you face in incorporating the middle school concept into your teaching, and how do you address them?

Research Question 2: What are teachers' perceptions of the extent to which the middle school concept is being applied in the middle schools in the Woodland School District?

6. To what extent do you think teachers in this district understand the middle school concept?
7. To what extent do you think school policies and practices align with the principles of the middle school concept?
8. Have you received any specific training or professional development related to the middle school concept?
9. How do you feel about the level of support provided to teachers in implementing the middle school concept?

10. What barriers or challenges do you perceive in fully implementing the middle school concept in our middle schools?

Research Question 3: What are teachers' recommendations about the professional development and support needed for applying the middle school concept in the Woodland School District?

11. How effective do you find the current professional development offerings in supporting the application of the middle school concept?
12. How can the district better support teachers in ensuring a more comprehensive implementation of the middle school concept?
13. If you were to suggest improvements or changes to enhance the application of the middle school concept in the district, what would they be?
14. What types of professional development formats do you think would be most effective for supporting teachers in applying the middle school concept?
15. Do you believe there should be personalized or customized professional development plans for teachers based on their individual needs and experiences with the middle school concept? Please explain your answer.
16. How can teachers provide feedback on the effectiveness of professional development initiatives related to the middle school concept?