

THE UNIVERSITY OF MANITOBA

REFERENCES OF THE 1982 LEITHWOOD AND THE 1983
ASSINIBOINE SOUTH CURRICULUM IMPLEMENTATION MODELS
TO THE 1982 CANADIAN STUDIES IMPLEMENTATION

by

RON SARANCHUK

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A thesis submitted to the Faculty of Graduate Studies of
the University of Manitoba in partial fulfillment of the requirements
of the degree of

MASTER OF EDUCATION

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ABSTRACT

This study referenced the 1982 Leithwood and the 1983 Assiniboine South implementation models to the 1982-85 Grade IX Canadian Studies implementation in the Assiniboine South School Division in an effort to investigate those curriculum areas and functions having relevance to the needs and concerns of local implementations.

Interview schedules, class observations, documentary analyses, and member checks were used to gather data on the two implementation models from administrators and teachers who were directly involved in the program implementation.

The 'implementation path' of each model was displayed in a parallel fashion and referenced according to the critical implementational categories of: i.) planning; ii.) organizing; iii.) supervising; iv.) communicating; v.) model development; vi.) staff development and participation; and vii.) administrative support.

Results indicated that the Assiniboine South process model was much more 'adaptive' and 'comprehensive' to the needs and concerns of the Canadian Studies implementation than was the Leithwood managerial model. However, a 'composite' framework made up of significant categories from each model warranted further empirical investigation.

This study will be of particular interest to those educators concerned with developing curriculum frameworks and procedures specifically designed to address 'local needs' in implementing curricula.

Chapter I

A STUDY OF CURRICULUM IMPLEMENTATION

A. Introduction

At this time (1991), only a few studies have served to address the specificity and relevance of the implementational categories and factors involved in the successful implementation of curriculum in particular locales. The proportion of empirically-derived, operational factors in the management of curriculum implementation compared to that which is theoretical, generic and descriptive, represents a very small fraction. The few studies that have investigated the topic are worth noting (Leithwood, 1982, 1986; R. W. Common, 1986; Robinson, Ross and White, 1985; McLaren, 1987; and Binda, 1989). Accordingly, one of the purposes of this study was to add to the credible, empirically-derived research on the issue.

In this study, references to planned curriculum implementation refer to deliberate, and "purposive" change (Dill and Friedman, 1979) in reaching some improved state of affairs, as opposed to accidental or unanticipated change. References made to the "managers of change" are the administrators and teachers directly related to the Leithwood and Assiniboine South implementation models, and to the Grade IX Canadian

Studies implementation in the Assiniboine South School Division from 1982-85. Their use of particular curriculum "categories" and "functions" refers to the specific curriculum components and their 'organizing' classifications critical to putting into operation a successful, and 'locally-sensitive' curriculum implementation process.

The concerns of those in developing the managerial-oriented Leithwood model were basically similar to those developing the process-oriented Assiniboine South curriculum implementation model: to identify and operationalize those curriculum categories and functions that would lead to success in implementing curricula. However, while this study focused on curriculum categories and functions critical to success in implementation, its view was slanted to those categories and functions that had particular relevance to the specific needs, concerns and characteristics of the particular educational environment in which the implementation took place, i.e., 'locally-sensitive'.

Research shows that investigations of educational change (Goodlad, 1975; Gross, Giaquinta and Bernstein, 1971; Sarason, 1971) coalesce in support of the change agent as a potentially critical determinant in its success. For example, Partlow, Turner and Cummins (1980) reported that the majority of Ontario administrators and teachers viewed curriculum implementation tasks as dominating their skill and knowledge requirements. In addition, Goodlad (1978) reflected on what has become a current concern in education:

It is now time to put the right things at the center again. And the right things have to do with assuring comprehensive, quality educational programs in each and every school under our jurisdiction (p. 322).

This study assumes that whether or not our students have access to "...quality educational programs" depends, to a large degree, not only on how well the implementations of the appropriate educational programs have been operationalized, but also how well they were able to address the specific conditions, needs, and concerns of their particular educational environments (Berman and McLaughlin, 1975). However, research shows that only a small proportion of curriculum implementors are effective in operationalizing educational change (Leithwood and Montgomery, 1982) with less than half of them attempting to assist others in the process (Blumberg and Greenfield, 1980). Not surprisingly, teachers ranked "managers of change" as having a 'medium' to 'weak' influence on their curriculum decision-making (Leithwood, Ross and Montgomery, 1978). In addition, Leithwood (1982) believes that while the low impact of the curriculum manager on classroom decision-making is widely known, few specific opportunities for curriculum managers to improve their expertise are available. Leithwood goes on to say that the effectiveness of the curriculum manager "...depends on a systematic and precise definition of requisite skills" (p. 268).

In referencing the categories and functions critical to the 1982 Leithwood and the 1983 Assiniboine South curriculum implementation models to the 1982-85 Grade IX Canadian Studies implementation in the

Assiniboine South School Division, this investigation sheds light on the complex tasks involved in implementing curricula in a particular locale. In effect, this study has tried to provide the curriculum implementor with an improved understanding, and expertise in developing meaningful, and 'locally-sensitive' frameworks designed to address local issues in his/her educational setting.

B. Significance of the Study

The significance of this study was overshadowed by the general assumption that there exists a positive link between a program's design, its implementation, and quality of student learning; and that the implementation, to be meaningful, must take into account the specifics of the locale in which the implementation takes place. More particularly, the major goal of this study was to provide for improved understanding of the beneficial processes involved in locally-planned curriculum change; and as an *ex post facto* study, fulfill its ultimate purpose of generating curriculum concerns worthy of future research.

Leithwood (1982) comments that while curriculum, and administration departments in universities have course-work in managing the curriculum implementation process, they do not provide guidelines specific enough to help curriculum managers satisfactorily resolve the implementational concerns confronting them. As noted in Chapter 2, the proportion of empirically-tested operational categories and functions requisite to

successful curriculum implementation as compared to those which are theoretical, generic, 'related to', and not investigated, is very small - this study can help to diminish that disparity.

Further, the dearth of research on this study's topic is accompanied by 'circular quotings'. For example, Robinson quotes Leithwood, Montgomery quotes Robinson, Ross quotes Montgomery, and Leithwood quotes Ross. Since this study's author does not belong to any particular research 'group', it is believed that this study's findings were not subject to the restrictive perspective usually associated with 'camp' or 'piggy-back' research.

The last three decades of educational research have not focused on curriculum implementation. During the 1970s, research told us what *not* to do in curriculum implementation while the research from the late 1970s to the present has focused on identifying success and effectiveness in our schools (Crandal, 1983; Fullan, 1982, 1985; Huberman and Miles, 1984). In effect, educational practitioners have not benefitted much from past research attempting to shed light on the successful management of curriculum implementation. This study has moved ahead from the research of the 1970s to that of the 1990s, and in so doing, increased our understanding and capacity to manage curriculum implementation. In undertaking this study, a contribution can be made to an area not yet researched in depth.

This study is also significant in light of the problematic nature of efforts in curriculum implementation (Romberg and Price, 1982). In the present Canadian context of increasing competition for financial resources, with

the rising onus being placed on educational accountability, particularly in being asked to provide programs 'appropriate to the particular needs' of the learner, schools must increasingly guard against 'procedural failure' in curriculum implementation, and become more adept in the design of implementational frameworks that address their particular educational needs.

As a potential benefit of this study, school organizations with conditions, needs, and concerns similar to those focused on in this study, may be provided with curriculum categories and functions helpful in developing implementational 'frame of references' that might help address their own local needs.

Thus, research contributing to successful curriculum implementation has emerged as a prime field of investigation. But, since this field is still in its formative stages, there is a need for greater precision in educators' knowledge, and abilities in 'framing' curriculum implementation processes appropriate to specific locales. Because of this need, administrators and teachers are expected to be knowledgeable and adept at managing change. Accordingly, there is a need to develop field-based models that help to identify and clarify those curriculum categories and functions which help promote successful curriculum implementation. Thus, of particular interest to the researcher in this study was the relationship between the key elements of the 'locally-sensitive' Assiniboine South curriculum implementation model to its capacity in implementing a new program in a particular educational environment.

This research will attempt to contribute to a more precise, detailed, and productive understanding of those categories and functions critical to curriculum implementation through an investigation of models referenced to a Grade IX-level Canadian Studies implementation in a particular school division.

C. Statement of the Problem

In order to assist in the 1982-85 divisional implementation of the Grade IX Canadian Studies program, the Assiniboine South School Division developed their own model designed to guide their implementation process. Thus, the Canadian Studies program implementation in the Assiniboine South School Division provided this study with a local context in which to compare the Leithwood and Assiniboine South implementation models (with particular emphasis on the capacity of these models to adapt to the local implementational environment).

This divisional Canadian Studies implementation provided the reference against which the following questions were pursued:

1. Overall, what were the degrees of relevance in the curriculum categories and functions of the 1982 Leithwood and the 1983 Assiniboine South curriculum implementation models when referenced to the Canadian Studies implementation?

2. What were the degrees of relevance in the specific categories of each implementation model as referenced to the 1983 Canadian Studies divisional implementation in Assiniboine South?
3. What were the categories and functions of both implementation models found sufficiently relevant to the Canadian Studies implementation to be included as part of a combined curriculum implementation model?
4. What were the degrees of administrative involvement in the Canadian Studies curriculum implementation according to the curriculum categories of the Leithwood and the Assiniboine South implementation models?

In order to answer these questions, the study needed to concern itself with its immediate and major task: to present a 'parallel presentation' of the 1982 Leithwood and the 1983 Assiniboine South 'implementation paths' as detailed by the subjects interviewed, and the documentary analyses of the Grade IX Canadian Studies implementation in the Assiniboine South School Division.

This study is ultimately grounded on the belief that the successful implementation of curriculum would help to ensure what Orlosky, McLeary, Shapiro and Webb (1984) call the 'paramount mission' of any educational effort: "...to enhance the capabilities of the learner" (p.6).

D. Statement of Theoretical Assumptions

1. Administrators are generally seen to have responsibilities for planning, organizing, supervising and communicating with their schools' human and material resources in achieving their desired educational objectives. Thus, in varying degrees, administrative support may help to account for the success of a program's implementation.
2. While teachers in Manitoba's school divisions are expected to base their teachings on provincially-stated program goals, responsibility for final classroom implementation rests with each local school division, i.e., its administrators and teachers.
3. A positive relationship is seen to exist between successful curriculum implementation and beneficial student learning.
4. Successful curriculum implementation utilizes the processes appropriate to the educational setting, i.e., planning, organizing, supervising, communicating, model development, staff development and participation, and administrative support.
5. Those involved in curriculum implementation may enhance their project's success by balancing their concern for the environment and process used to attain the implementational goals with their concern for the outcomes.

6. The focus for change is seen to be the classroom teacher - with system and school-level administrative support.
7. Responsibility for the professional development of teachers in implementing new programs needs to be shared by individual teachers, the School Division, and Manitoba Education.
8. While no two school divisions face exactly the same environmental conditions and concerns in dealing with curriculum implementation, the implementational procedures used in Assiniboine South may have sufficient transferability for other divisions to profit from this study.

E. Statement of Limitations

1. The availability of hard information on the Canadian Studies implementation in the Assiniboine South School Division dates back to 1983.
2. Because of the long time span between the beginning of the Canadian Studies implementation and the present (1991), the recall abilities of the actors involved in that implementation may be adversely affected.
3. A number of people who were involved in the 1983 implementation in Assiniboine South may now not be employed with the Division, and

therefore may not be available to the researcher for data-collection purposes.

4. Conditions associated with the time lapse (between the 1982-85 implementation, and this research study) may have had a negative influence on the reliability and validity of this study.

5. Some findings in this study's literature review may not relate directly to the Manitoba program context.

6. This study carries a decided administrative emphasis, i.e., it focuses on 'curriculum managers' (teachers and administrators) fulfilling their legal and professional responsibilities in implementing curricula successfully.

F. Statement of Delimitations

1. This study will be delimited to the time period from January, 1983 to June, 1991. This period represents the time from which the curriculum implementation began to that of the completion of data collection and thesis writing.

2. The locale for researching the field-based program implementation was the Assiniboine South School Division.

3. The scope of this study was delimited to the system-school level implementation of only the Grade IX Canadian Studies section of the provincially-issued (Manitoba) K-XII Social Studies program.

4. This study's focus was on only the categories and functions of the 1982 Leithwood, and 1983 Assiniboine South implementation models examined with respect to their relevance in addressing the needs of the Grade IX Canadian Studies implementation in the Assiniboine South School Division.

G. Statement of Definitions

Administration - "the process of working with and through others to efficiently accomplish organizational goals" (Sergiovanni, Burlingame, Coombs and Thurston, 1980, p.5).

Canadian Studies - programs dealing with the Canadian society as a totality, in country-wide, interlocking perspectives that can be shared by all Canadians wherever they live; in particular, the Grade IX program outlined by Manitoba Education in the 1985 Social Studies K-XII overview.

Categories - those unifying factors serving to cluster curriculum implementational functions.

Change - movement from one set of attitudes, beliefs and behaviors to those of another.

Curriculum - organized learning containing a statement of aims and of specific objectives; it indicates some selection and organization of content, and patterns of learning and teaching, and includes a program of evaluation of outcomes (Taba, 1962).

Curriculum Management Skills - the planning, organizing, supervising and communicating of operational skills required by curriculum managers in implementing a curriculum.

Curriculum and Program Guides - documents issued by provincial or state education departments and used as program guidelines in school divisions.

Effectiveness - "doing the right things right" (Drucker,1974), i.e., the appropriate program goals, objectives, activities and evaluations must be properly applied to the classroom setting.

Efficiency - "doing things right" (Drucker,1974), i.e., proper program implementation without prime regard for the appropriateness of the program to the classroom setting.

Functions - those skills and principles deemed operationally critical to implementing curricula.

Implementation - "...the process of putting into practise the essential characteristics of an innovation" (Fullan, 1975, p.1).

Innovation - a significant departure from standard school practises. Fullan (1982) explains that innovation may represent a dynamic interaction among three dimensions:

- a) the use of new materials (direct instructional resources such as curriculum materials and/or technologies);
- b) the use of new teaching approaches; and
- c) the alteration of beliefs (such as pedagogical assumptions or theories underlying new policies or programs).

'Locally-Sensitive' - able to address the conditions, needs, and concerns of a particular educational environment.

Management - the process of utilizing organizational resources in achieving an institution's specific objectives

Management Functions - (Leithwood, 1982):

- i. Planning - specifying goals, and activities leading to realizing program objectives;

- ii. Organizing - includes coordinating and identifying the relationship among different positions and people in the organization for the purpose of carrying out a plan;
- iii. Supervising - monitoring implementation of a plan; involves collecting and acting on information related to organizational goals, strategies and personnel; and
- iv. Communicating - the transmission and reception of information relevant to, and productive in, implementing a curriculum.

Manager of Change - Change Agent - administrators and teachers who were directly involved in the process of planned curriculum change.

Model - a subjectively-based set of categories, assumptions and relationships serving to render utility and simplification to a particular phenomena such as curriculum implementation.

Planned Change - the process of 'improvement' or 'getting better'; a process of reducing the gap between desired and stated educational outcomes and those outcomes students are presently achieving. Planned change is a non-neutral term in that it implies at least a preferred direction, if not a valued outcome (Leithwood, 1986).

Professional Development - acquisition of knowledge, understandings and skills that contribute to becoming an increasingly competent curriculum implementor.

Chapter II

REVIEW OF THE LITERATURE

A. Introduction

In keeping with the rationale of this study, this literature review was designed to provide, in 'parallel' fashion, literature and research relevant to: the managerially-oriented 1982 Leithwood, and the process-oriented 1983 Assiniboine South curriculum implementation models. As such, this chapter concerned itself with: the Grade IX Social Studies program change; the key elements of the managerial, and process models; the literature 'related to' the curriculum categories and functions critical to the implementation process of each model; the actual managerial and process research investigations carried out to-date; and, the nature, advantages, disadvantages, and purposes of this particular *ex post facto* study. The material in this chapter is designed to contribute to our 'procedural knowledge' (Leithwood, 1986) of planned educational change by identifying, and explaining those curriculum categories and functions having the capacity to address local needs, concerns and conditions in implementing curricula.

Critical to this study was the fact that the curriculum categories and functions of the Leithwood and Assiniboine South models were seen

through their references to the 1982-85 Grade IX Canadian Studies implementation in the Assiniboine South School Division. The thrust, content, goals, and learning strategies of the Grade IX Canadian Studies program differed from those of the Southern Continents and British History program it replaced. In the Canadian Studies program, students were expected to examine their own society, and their roles in it. The program focused briefly on Canada's six physical geographical regions, and identified some of the elements of unity and disunity facing Canada. It then considered the political, legal and economic processes which affected Canadian society along with the implications of an ever-changing technology on our way of life. It investigated Canada's role within the world community - its interdependence, relationships and interactions - and speculated about Canada's future, and our students' potential roles in it. In contrast, the Southern Continents and British History program placed students in a more remote time and place by having them study medieval Britain, Canada's parliamentary system as it has grown from the British tradition, and numerous geographic fundamentals as applied to Africa, Australia, and New Zealand.

The differences between these two programs, and the implementation of one over the other, relates: to 'innovation' "...an idea, practise or object perceived as new" (Rogers and Shoemaker, 1971, p. 19); and to 'change' in that new program materials, teaching approaches, and beliefs (Fullan, Eastbrook and Bliss, 1977) were instituted.

Consequently, Manitoba Education in its 1988 *Administrative Handbook* identified Assiniboine South's responsibilities and roles in the Canadian

Studies implementation: to plan the implementation within the time-lines of Manitoba Education; to establish a divisional subject or curriculum steering committee for and during the implementation; to identify subject-area teachers to attend departmentally-sponsored training sessions; to plan and organize teacher in-services in the Canadian Studies program area; to provide on-going divisional consultant services to subject-area teachers; to allocate the majority of the eleven in-service and administration days authorized by Manitoba Education for the Canadian Studies implementation; and to provide the necessary financial support for the implementation. In addition, responsibility for developing objectives for managing the depth, pacing, and assessment of student performance compatible with those of the Province rested at the local level - with the teacher, the school, and the school board.

While failure in the process of educational change could occur at any point, many believe (MacDonald and Walker, 1976) that implementation is the most critical stage or factor in the entire process, and that use of a curriculum seldom corresponds with its intent (Berman and McLaughlin, 1976). In this way, the understanding of curriculum implementation is related to, and dependant upon, an understanding of planned educational change.

B. Key Elements of the Leithwood and Assiniboine South Models

This section is presented in order to help clarify the differing foundations, categories, properties and assumptions between the 1982 Leithwood and the 1983 Assiniboine South curriculum implementation models. Research by Berman (1980) identified two implementation models relevant to this study: the fidelity or managerial model, and the mutual adaptation or process model.

i. Foundations

In its design, the 1982 managerial Leithwood model combined research from classical management theory (Fayol, 1949) and from general curriculum studies (Miles, 1964; Saylor and Alexander, 1966). In making up his model, Leithwood adopted the four managerial processes of planning, organizing, supervising and communicating. He then identified the curriculum implementation tasks critical to the operational to each process. Leithwood derived these curriculum categories and functions from the implementational concerns of several teachers and administrators, with whom he worked, in a number of southern Ontario school districts. As such, these curriculum categories and functions were derived from the needs, concerns and conditions of a diverse group of educational environments. Because of this synthesis, Leithwood's curriculum categories and functions are intended to be referenced *across* the needs, concerns and conditions of several educational environments.

In contrast, the Assiniboine South process implementation model was developed by its Divisional Professional Development Committee. The nine committee members, composed of representative administrators and classroom teachers from across the Division, researched theoretical and institutional sources in order to generate data on curriculum implementation models. Over a one year period, they combined selected theoretical data, e.g., from Sparks, (1983), with their local educational needs, concerns and conditions in order to develop a framework (Appendix D) designed to guide the Division through the Grade IX Canadian Studies implementation. More specifically, the Committee based its model design on its beliefs that, for the Grade IX Canadian Studies implementation to succeed in the Assiniboine South School Division, the heart of the implementation model must address those factors which it felt to be of prime concern to the teachers in Assiniboine South: that teachers needed to be *aware* of the particulars of the Canadian Studies implementation before they could meaningfully accept, and participate in that implementation; and that in order to meaningfully become involved in the instructional delivery of the new program, Assiniboine South teachers needed time, opportunity and practise in developing unit-plans associated with the goals, and objectives of the Canadian Studies program. To these ends, the Committee designed its implementational model so that 'communication' and 'staff development and participation' opportunities were the operational vehicles by which the local needs and concerns were addressed.

ii. Categories

Table 2, subsections i. - iv. (p. 99) identified the four categories and the 30 corresponding functions that comprised the 1982 Leithwood curriculum implementation model. The four management-based categories of 'planning', 'organizing', 'supervising', and 'communicating' were the general areas through which the Leithwood model was intended to accomplish its objective; to guide the implementation of curricula. The particular means of operationalizing the implementations were based on the 30 tasks Leithwood specified as critical in carrying out any and all implementation processes.

Table 2, subsections v. - vii..(p. 99) identifies the three curriculum categories and 24 functions critical to the Assiniboine South implementation model. The categories of 'model development', 'staff development and participation' and 'administrative support' answered directly to the needs and concerns of the implementation in the Assiniboine South educational environment. The Professional Development Committee identified 24 functions which would help operationalize the successful implementation of the Canadian Studies program in the Assiniboine South School Division.

iii. Properties

The 1982 Leithwood model has properties corresponding to the 'fidelity-managerial' category of curriculum models as researched by Fullan and Pomfret (1977).

Twelve of the authors' 15 curriculum studies researched examined the extent to which the innovation in practice corresponded to its original intent. The research identified five dimensions of implementation in practise: "...changes in a) subject matter or materials, b) organizational structure, c) roles and behaviors, d) knowledge and understanding, and e) value internalization" (p. 361). In 1982, Fullan published a comprehensive description and analysis of the determinants of change pertinent to 'fidelity-managerial' models in a book titled *The Meaning of Educational Change*. These determinants were categorized according to characteristics: a) of the change - need and relevance of the change, its clarity, complexity and quality; b) at the school District Level - its history of innovative attempts, the adoption process, the support and involvement from central administration, in-services, evaluations, and board and community characteristics; c) at the School Level - the principal, teacher-teacher relations and teacher characteristics; and d) external to the local system - the role of government, and external assistance (p. 56). Fullan (1982) cautions that the three basic aspects of implementation (materials, teaching approaches, and beliefs), along with the determinants affecting an implementation, interact in any given school division as an integrated rather than isolated system of variables.

The Assiniboine South implementation model, by contrast, has characteristics similar to the mutual-adaptation (process) model of implementation as researched by Berman and McLaughlin (1976) from a survey of 293 American federally-funded change projects.

While the researchers cited three measures (similar to those of the managerial-fidelity model) on the effectiveness of an implementation's success: perceived success, change in behavior, and fidelity of implementation, Berman and McLaughlin (1976) summarized that "...the issue of implementation is often more subtle and complicated than mere fidelity to some specific blueprint for reaching a set of educational goals" (p. 349). In the intensive study of 29 of the 293 curriculum change projects, the researchers (1976) noted that "... local school systems are so structured that, in order to implement significant innovations, there needs to be a process of mutual-adaptation" (p. 349). Berman and McLaughlin (1975) defined 'mutual-adaptation' as "...a two-way process of adoption in which the innovative strategy is modified to suit the institution, and the institution changes to some degree to suit the innovation" (p. 19). Thus, the process implementation stages are viewed through the interplay of a curriculum implementation's characteristics and the setting particular to that implementation.

The researchers identified particular elements as the main components of an implementation strategy which promotes the mutual-adaptation (process) approach: a) adaptive planning - quality of planning which matches the project's needs; b) frequent and regular staff meetings - making planning a continuous process and providing a forum for reassessing project goals, activities and achievements according to institutional and project demands; c) staff training keyed to the local setting - to the specifics of the project's operation; d) local materials development - ranging from careful assessment and repackaging of existing

products to producing 'from scratch' a wide range of project materials; and e) critical mass - a significant number of project participants necessary to build the support and morale of the project's staff.

iv. Assumptions

Research (Fullan and Pomfret, 1977; Berman and McLaughlin, 1975) identifies the main assumptions which underline implementation models. Differences (and similarities) in assumptions amongst models is "...attributable to the competing conceptions of curriculum and implementation" (Berman, 1980, p. 30).

Fullan and Pomfret (1977) identified assumptions basic to the managerial-fidelity (e.g., Leithwood) model: implementation is a process; the innovation will get adopted and modified through use; implementation is a process of professional development and growth; implementation involves changing new materials, behaviors and values; communication and technological assistance are essential; planning at the school and the system level is a necessity; and the 'ultimate' goal of implementation for systems and schools is to develop their 'capacity' for processing their innovations.

The assumptions identified by Berman and McLaughlin (1976) as basic to the mutual-adaptation (e.g., Assiniboine South) model are that implementation, rather than the funds committed to it, dominates the innovative process and its outcomes; the implementation depends, to a large degree, on the receptivity of the institutional setting to change; implementation is characterized by the process of mutual adaptation; and

that local school systems vary in their capacities to deal with the stages of the innovative process (p. 365).

The comparison of elements particular to the fidelity (managerial) and mutual-adaptation (process) curriculum models points to their most significant difference residing in the *intent* of each model. Whereas the Leithwood model seeks to replicate the behaviors prescribed in its model with those of the actual implementation by re-socializing the actors involved in the implementation, the Assiniboine South model seeks to change classroom practises by adapting to the program *and* the environment in which it is to be implemented. While the Leithwood model was founded on concerns from diverse audiences and locales, its key elements and design is 'generic' and 'universal' in nature. The Assiniboine South model, on the other hand, referenced its concerns to the immediate group and locale with whom it was working. The manner in which the implementations were carried out thus reflected a different method: the Leithwood model relied on a 'curriculum manager' to direct the sequence of tasks to be performed; the Assiniboine South model relied on the interaction and growth of its actors in implementing the program according to the needs of their local situation.

On the other hand, both models utilized common administrative processes, and both initiated their processes from a central control, e.g., the Leithwood and the Assiniboine South models, in varying degrees, utilized the processes of planning, organizing, supervising, and communicating, and each had a 'top-down' design. The fact that these two diverse models did have similarities (as well as differences) is in keeping

with Parker and Rubin's (1966) statement: "No one method will permit a universal implementation of new programs" (p. 53-54). These authors proposed that a variety of methods and assumptions need to be incorporated into any program shift.

However, because the 'process approach' (Fullan and Pomfret, 1977) concentrates on the incremental growth of an innovation within an organization, it is more closely aligned to an internal perspective than is the managerial-fidelity approach. Thus, the Assiniboine South model "...de-emphasizes the linear, unilateral, means-end view of implementing planned change...and emphasizes the halting, interdependent incremental nature of organizational change" (p. 364).

C. Research 'Related to' Implementation Categories and Functions

Most of the literature on curriculum implementation 'related to' management processes and conceptual frameworks that were general and ill-defined. Subsections i.-iv. relate to those curriculum categories and functions critical in the design of the Leithwood model while subsections v.-vii. relate to those of the Assiniboine South model. The 'background information' in this section is representative of that which provided researchers with the theoretical curriculum bases which helped them to concentrate more specifically on identifying the defined, specific, and operational implementation categories and functions noted in Section D.

i. Planning

Passow (1962) and Miles (1964) reported on planning studies at the local-school level. They concluded that coordinated efforts are needed to link project peers. Suggestions they offered involve: adequate encouragement and support of innovators by the school principal and other status leaders; development of pilot studies and demonstrations with the knowledge and active cooperation of the entire faculty; collection of evidence on the progress and outcome of the innovation; observation and reporting on the innovation by faculty; general understanding that experimentation as a means of curriculum improvement is to be encouraged.

Saylor and Alexander (1966) differentiated 'effective' from 'ineffective' curriculum planning according to: recognizing significant problems faced by members of the curriculum planning group; interest and involvement on the part of those who worked directly with pupils in the school situation; patterns of administrative procedure and quality of administrative leadership that encourage individual initiative from all school personnel; a clearly defined organization for curriculum planning with a definitely agreed-upon procedure for effecting change; adequate facilities and time for curriculum study and experimentation with new practises; the availability of adequate technical services in the curriculum planning process; opportunity for interchange of experience, including inter-classroom observation; and recognition of those personnel who sincerely and successfully work to improve their practises.

Wiles and Bondi (1979) summarized those positive tasks in implementation planning at the divisional level to be: clear articulation of objectives; effective communication, particularly those between the school and the community; maximum utilization of resources within the school district; coordination of information for decision-making; identification of obstacles to change; and monitoring of the plan's progress.

The Manitoba Education (1984) Study on Curriculum Implementation made reference to the following planning factors: staff understanding of the basic assumptions and objectives of the curriculum; recognition of unique school and divisional characteristics; use of a planned and structured implementation process that includes time-lines, roles and expectations; provision of appropriate curriculum guides to teachers; and recognition of cultural differences amongst students.

In 1986, Doll added the following points to the list of planning components fundamental to curriculum implementation: assessing the needs of pupils and teachers (establishing "where we are" provides a base for future action); gauging the competencies of committee members; and staging the critical steps to be taken throughout the entire process. Doll concluded by saying that all persons affected by a given project should be involved with it; that consistency between the ascribed means and ends of a project must be maintained; and that specific responsibilities for implementation tasks must be accepted and carried out professionally by those involved.

ii. Organizing

Saylor and Alexander (1966) proposed the model *Organization of the Individual School for Curriculum Planning* which raised issues for organizers at the school division level. The authors proposed five characteristics of good school organization which can be applied to curriculum implementation: curriculum planning efforts organized in terms of goals resulting from the thoughts of all persons directly affected; each person and group is utilized in terms of his potential contributions rather than with respect to sharp lines between pupil, parent, layman and teacher participation; each job assigned a committee or an individual is in terms of the needs of the total program with final decisions made with reference to the program of the school as a whole rather than to departmental or other special interests; an atmosphere of cooperative planning and constructive evaluation pervades all groups of the school; and a continuing search is made by leadership to identify services, materials, facilities, and persons that can contribute to curriculum implementation.

Wiles and Bondi (1979) mentioned primary values and terminal goals to be considered within organizational contexts. They summarized much of what the literature suggests as promising to implementation success with new programs, and see the primary values underlying a program of organizational development as: opportunity for each organization member to develop to full potential and act as human beings rather than as resources in the productive process; striving to create a challenging and exciting work environment; and the opportunity for people in the organization to influence the way in which they engage in their work. They listed the eight

terminal goals for a program of organizational development as: an open problem-solving climate throughout the organization; decision-making responsibilities located as close to the information source as possible; authority of role supplanted by authority of knowledge and competence; increasing degrees of trust among individuals and groups in the organization; maximization of collaborative efforts in daily work; increased feelings of ownership by organization members; and increasing degrees of self-control and direction.

R. Common (1979) promoted model-building as an effective method of implementation. Other supporters for model-building include: Fullan, Miles and Taylor (1978), Gross et al. (1971), Hall (1975), Leithwood (1974, 1977), Brantley (1975) and Winklevoss (1975). Common's statements support model-builders in school division program change. He suggests a model might offer practical frameworks for organizing the contexts, defining and carrying out the tasks in a program change. It could also direct interaction and coordination of efforts for individuals involved in the change process and also incorporate ongoing evaluation.

As well, the Manitoba Education Curriculum (1984) Study noted the following aspects of organization as being related to effective implementation: commitment by divisional administrators to the development of a structured process; school administrators knowledgeable and supportive of curriculum implementation; teacher commitment to the curriculum; implementation plan development using a cross-section of staff including librarians and resource people; and a successful and well-supported curriculum piloting of the implementation.

iii. Supervising

The process of supervision in curriculum implementation involves collecting and using information related to program goals, strategies and personnel. As such, evaluation provides the curriculum manager with information regarding the degree to which purposeful action has taken place.

Doll (1986) identified the qualities of an effective evaluation of curriculum implementation to be: presence of values and valuing - a conscious recognition and expression of the values the evaluator holds; goal orientation - e.g., information-getting, understanding, skill development, perceptions, critical thinking, and attitude change; comprehensiveness - evaluation must be as broad as the goals to which it relates; continuity - evaluation should be frequent and recurrent; diagnostic worth, validity and reliability - instruments of evaluation should be able to measure what they purport to measure ("diagnostic fit") over time; integration of findings - to combine significant findings so their inter-related meaning becomes evident; and progress toward goals - important in order to know if, when, how and in what direction progress has occurred. (p. 225)

The 'supervising' criteria have implications for the nature and the evaluation of curriculum implementation projects. They imply that such projects should "get somewhere" and move as far within their allotted life spans as possible. The sweep of supervising curriculum implementation has been described by Bowers (1978). He begins with concerns and questions with which the evaluation might deal, and proceeds to a summary

of information about the implementation to be evaluated. Further planning includes three steps: making elements of the program clear; determining priorities for further planning of the evaluation; and arranging for the collection and use of evidence. Each of these planning steps encompasses outcomes anticipated for learners, on the nature of the curriculum content, the way the content is sequenced, the instructional approach used, and the extent and nature of project support.

Grobman (1968) has suggested that curriculum evaluators take a series of process steps designed to achieve better evaluations: using tests that are valid and reliable; reviewing program materials so as to be thoroughly familiar with them; making visits to the program site; asking teachers what they think of the programs in which they are involved; using questionnaires wisely to gather data; and utilizing small-scale tryouts of evaluation ideas (p. 48). As Lindwall and Cox (1970) point out, evaluation can become a 'process tool of worth' in efforts to improve the curriculum. The authors emphasize the importance of evaluating instruction in order to distinguish between the characteristics of the students who succeed, and of those who do not.

Beyond the technical aspects of curriculum evaluation, there are some common-sense considerations to be observed. Some of these have been suggested by the Association for Supervision and Curriculum Development (1965): "Do we have initial data on learners - their achievement, their motivation, their personalities?"; "Do we have initial data on teachers - their strategies, their motivation, their knowledge, their personalities?"; "Do we have these data at many stages during the implementation of the

project ?"; "Are the changes which we expected actually occurring? Why or why not ?"; and "Do changes justify the time and funds expected ?" (p. 14)

These foregone 'supervising' considerations were noted to express the expectation that worthwhile evaluation follows an ongoing procedure throughout the life of a curriculum implementation, and is not merely an end-of-the-line operation.

iv. **Communicating**

According to Doll (1986), most communication activities today are hit-or-miss, not part of a comprehensive plan. He believes that communication activities designed to improve curriculum should take into account the following criteria: the media of communication used to disseminate information about curriculum projects should depend on the special purposes to be served; communication units should be kept small and messages should be brief, and direct; ample time for communication is necessary; lines of communication should be kept short; potential communicators should be sought among members of the staff; and invention is needed in developing new communication practises. The author concludes with the guidelines for improved communication in curriculum implementation: emphasize good human relations; make exchange of ideas the major goal of the system; be sure that the message sent is also received; use varied communication media; schedule time for communication; and make the materials that convey each message attractive. (pp. 389-419)

Much of the research has revealed several additional ideas that may affect communication: theoretical communication structures are not necessarily the actual ones.- study is needed to determine just how communication is occurring (Ross, 1960); big schools and systems do not necessarily suffer from malcommunication because of their size - good school communication may depend heavily on good school organization (Knower and Wagner, 1959); curriculum planners should become acquainted with the teaching situations of the planning group members so that they may know the experiential backgrounds that influence the members words and actions (Lawler, 1958); status affects communication.- information and ideas initiated by top-level administrators move into channels of communication more readily than information and ideas initiated by teachers (Peters, 1960); of the means of communication, individual school faculty meetings are primary (Peters, 1960); and if communication is to proceed upward, downward and horizontally, the organizational structure of the school may have to be adjusted to permit a wide-ranging flow of messages (Kusimo and Erlandson, 1983).

Parker (1983) refers to communication networks and outlines six commonly effective traits: shared purpose and commitment to the innovation; openness in sharing, and discretion in using information; combination of professional and personal support; voluntary participation by and equal treatment of members; and one or more members functioning effectively as the facilitator.

As well, other researchers highlight the role of communication in the management of curriculum implementation. D. Common (1981) stresses

the need to establish communication and feedback networks in an open and adoptive organizational 'substructure', while R. Common (1979) concluded that implementation success is related to a participative management style characterized by supportive relationships of group members, i.e., participatory decision-making with information flowing freely amongst participants. The Manitoba Education Study on Curriculum Implementation (1984) recommended that the divisional implementation plan be disseminated to all the relevant actors, and that teachers across a division be provided opportunities to share their teacher-developed materials with each other.

v. Model Development

Implementation models developed through theorizing often suggest questions that need to be answered, and often incorporate assumptions and positions on implementation that need to be tested (Fullan, and Taylor, 1978; Hall, 1975; and Leithwood, 1977). Too often the developed models are misleading and misrepresentative as the complex phenomena of the implementation process are presented either in an overly simplified form or are reduced to a static state (Chopanis in Zais, 1976). The educational consumers, i.e., the practitioners to whom a model is directed, have the responsibility of selecting one model in their particular field from the often bewildering variety in the literature. If the practitioners are not disposed to apply models they discover, they may either design their own or reject all models that prescribe order and sequence. They may thus proceed

intuitively without the apparent limitations imposed by a model and come out with a 'locally-sensitive' working model at the end of the process.

Particular to this study was the development of a curriculum model which specified its major phases and its related sequential activities. As Taba (1962) stated, "If one conceives of curriculum development as a task requiring orderly thinking, one needs to examine both the order and process in which decisions are made to make sure that all relevant considerations are brought to bear on these decisions" (p. 11). Taba, in taking a grass-roots approach to curriculum believed that the curriculum should be designed by teachers rather than handed down by a higher authority. Taba's model for accomplishing curriculum change is: production by teachers of pilot teaching-learning units representative of the grade or subject area; testing experimental units; revising and consolidating; developing a framework; and installing and disseminating new units. Thus, Taba advocated an inductive approach to model development, starting with specifics and building up to a general design. In contrast, Tyler's (1949) authoritarian 'top-down' curriculum model infers that learning occurs as the 'gap' between the student's current and preferred behaviors, and that instructional activities consistent with the program's objectives are the instructional tools for closing this 'gap'. Thus, Tyler's model links educational objectives, program activities, and the effective organization of these activities with educational evaluation.

In referring to these two models, similarities and differences are both revealed. But, only as referenced to particular conditions can one say that

one model is necessarily or inherently superior to all others (Parker and Rubin, 1966).

As research continues, it becomes apparent that refinements of models can be made so as to enhance their utility in particular situations. To this end, Oliva (1982) recommends that implementation models show: major components of the process; customary 'beginning' and 'ending' points; the relationship between curriculum and instruction; distinctions between curricular goals and instructional objectives; reciprocal relationships between components; a cyclical rather than linear pattern; feedback lines; and an internal consistency, logic and simplicity.

Thus, the research (Berman and McLaughlin, 1976; Taba, 1962; Oliva, 1982) strongly points in the direction of models locally constructed, and designed to address the concerns of the particular situation in which the curriculum implementation is to take place.

vi. Staff Development and Participation

Based on reviews, original research, experience and intuition, many authors provide characteristics they deem essential to an effective staff development and participation program. The following offers a sampling of these effective characteristics.

Mertz (1983) in *Staff Development Leadership: a Resource Book*, identifies ten facets of effective staff development and participation: involvement of teachers and other participants in program planning and decision-making; support from the organization and administration; focus on situation-specific efforts (usually the school) and on job-related tasks;

provision of practical ideas, skills and materials which have immediate application to the job situation; involvement of teachers, supervisors and administrators in collaborative planning, implementation and participation; meeting the needs of participants; being systematic and comprehensive; operating in a climate that encourages collegiality and mutual support; being accessible to participants, usually occurring at the school site; and provision for on-going, continuous evaluation which assesses the process, program, participants and student achievement.

Wood, Thompson and Russell (1981) proposed the RPTIM Model (Readiness, Planning, Training, Implementation and Maintenance) as a comprehensive framework for designing staff development and participation programs. They recommended five stages for staff development and participation: readiness - emphasizing selection and understanding of, and commitment to, new behaviors by a school staff; planning - the specific plans for an in-service program developed to achieve the desired changes; training - the plans translated into practise; implementation - focuses on ensuring that the training becomes part of the on-going professional behavior of the teachers and administrators in their work setting; and maintenance - as new behaviors are integrated into daily practise and to ensure that once a change in performance is operational, it will continue over time.

Of particular reference to Social Studies is the model for staff development and participation proposed by Sparks (1983) in which implementation at the district level would evolve along the following lines: each district school would nominate a key Social Studies teacher willing to

serve on a Core Committee; the Core Committee would consist of the key teachers, together with two representatives each from district office and the district principals; the Core Committee would first examine the goals and objectives, and make classroom evaluations of the current Social Studies program; once the discrepancies were identified, the Committee would then select priority objectives and form subcommittees to investigate the potential problems; a two-week summer institute would be organized for the Core Committee and would concentrate on building up expertise in the identified weaker areas; once strategies were planned, there would be a "school-based tryout" involving the core teachers; the Core Committee would set up in-service teams and carry out activities in each district school; each school would then form school committees for ongoing identification, study, and discussion of local needs and problems; and this committee would develop further refinements of techniques and be a constant source of updated information to others. This model would revolve around active teacher participation and would expand in two ways: by increasing the range of teaching strategies; and in becoming increasingly skillful in the use of each of these strategies.

Also of relevance to this study is the 'collaborative' relationship involved in staff development and participation. Trubowitz (1984) describes collaboration as "...included ongoing dialogue, the development of trusting relationships, and cooperative decision-making". Zide (1982) identifies successful collaborative efforts as having two characteristics: commitment, and interface with the organization. The works of these authors recommend the active involvement of teachers and administrators

in implementation as related to the local environment, and the establishment of a climate for growth and change within that environment. Beauchamp (1975) apparently considered such a scheme workable as he believed that the most successful practise is undoubtedly school-based and collaborative - it encompasses both the necessary in-service training and provision of all the support services required - with the staff involved as team members working together on the project-at-hand.

Thus, the literature on staff development and participation leans in the direction of 'site' and 'collaborative-based' staff development and participation with reference to program planning, staff training, and process evaluation.

vii. Administrative Support

In the context of this study, it was important that teachers and schools receive support from administrators on two levels: divisional, and school. Research from diverse sources shows that support of central administrators is critical for change in district practise (Emrick and Paterson, 1978). Research also shows that support for or endorsement of a new program has very little influence on change in practise unless central administration *demonstrate through actions* their support for the implementation (Fullan, 1982). Rosenblum and Louis (1981) investigated the effects on implementation by a superintendent's authority, and by teachers' classroom autonomy. They found that the number of decision areas influenced by the superintendent was positively linked to divisional implementation of a new curriculum, and the number of classroom decisions that teachers can make

on his or her own was negatively related to implementation. The authors suggest that a degree of centralization is necessary for implementing curricula across schools, and that, in times of implementation, teacher autonomy must be associated with common standards in curriculum decision-making.

Although still in its early stages, research is increasingly associating the school principal with effective curriculum implementation. Berman and McLaughlin (1979) note that one of the best indicators [of active involvement] is whether the principal attends implementation workshop sessions with teachers. Loucks and Hall(1979) found that in schools where effective implementations resulted, principals monitored the classroom implementations in support of teachers in their use of the innovation, set school policy congruent with the subject-implementation, worked on teacher-specific implementation problems, and served on the district-wide implementation committee. Pointing to the influence that principals can have on curriculum implementation, Hall and Loucks (1980) concluded that the single most important hypothesis resulting from their data was that the degree of implementation of an innovation is different in different schools according to the actions and concerns of principals.

The curriculum change particular to this study is that which affected most principals (change which was initiated external to the school by the district and provincial government). However, it is important to note other research into the role of the principal. Sarason (1971) found that most of a principal's time is spent on administrative housekeeping matters and in

maintaining order. "Containment of all problems is his theme. The principal cannot be a change agent or leader under these conditions." (p. 145). Crowson and Porter-Gehrie (1980), in a detailed 'principal observation study' in 26 urban Chicago schools, found principals' work oriented toward maintenance, i.e., disciplinary control; keeping outside influences under control and satisfied, mediating in staff conflicts, and keeping the school supplied with adequate materials and staff. In addition, Peterson's (1981) study found principals' work days to be sporadic, characterized simultaneously by brevity, variety, and fragmentation.

The critical point of this research is the highlighting of divisional and school level support for curriculum implementation - divisional support for the implementation *across* schools, and school-level support for implementation *within* the school. Research summarizes what is known about the role of the principal in curriculum implementation: a large percentage of principals operate mainly as administrators and as *ad hoc* crisis managers, and are not effective in supporting school change; those principals who do become involved in change do so either as direct instructional or as facilitative instructional leaders, and can be effective in supporting school change; and because the principal cannot become a subject specialist in all areas, and has great demands on his time, being a facilitator or coordinator of change is the preferred role for success at the school level.

D Actual Managerial and Process Model Studies

i. Managerial

In his 1982 publication *Studies in Curriculum Decision Making* (pp. 268-286), K. A. Leithwood explains that an impediment to the development of curriculum management is the lack of prior identification of curriculum implementation skills. Leithwood contended that if curriculum implementation is to be accomplished, precise and systematic definitions of the requisite skills involved needs to be found. The following managerial implementational studies sought to arrive at such definitions.

R. Common (1986) in *A Trouble Shooting Manual for Managers of the Change Process* has identified managerial tasks (identify, plan, provide, encourage and evaluate) he says are pertinent to all levels of implementation (p. 115). R. Common then applies each level of implementation to six levels of use (awareness, investigation, preparation, functionalization, customization and integration). The product of this application is a list of 369 generic implementation behaviors categorized according to six 'levels of use' and 'levels of implementation' that can be applied to one's particular educational environment.

In *Curriculum Development for Effective Instruction*, Robinson, Ross and White (1985) adhered very closely to Leithwood's 'Evolutionary - Growth' implementation model. Unlike Fullan or Leithwood, these authors focused on the classroom - their tasks related directly to teachers' instructional and students' learning behaviors. Their intention was to

develop a more effective procedure for ensuring student growth by concentrating on teacher-student behaviors designed to maximize student learning at the local classroom level.

McLaren (1987) in her doctoral dissertation, *Dimensions of Behavior of the School Principal in an Elementary School Curriculum Implementation*, generated information leading to further development of specific and requisite school-principal behaviors critical to the process of implementing new curricula at an elementary school level. McLaren found that twenty implementation behaviors categorized under 'goals', 'factors' and 'strategies' (p. 61) used by a principal in a computer curriculum innovation contributed to his level of educational leadership and to the success of the computer innovation.

Binda's (1989) doctoral dissertation *Elementary School Principals and the Process of Curriculum Implementation* examined how school principals proceeded with the process of implementing new curricula in elementary schools. The study found that the principals were concerned about curricula meeting the needs of pupils, and therefore, spent a good portion of their time implementing the new curricula, upgrading themselves and their staffs, providing materials, modelling instruction, modifying administrative structure, and providing leadership, all at the local school and classroom levels. Binda recommended that innovative curricula should be introduced in small, phased amounts, rather than on a large scale over a short period of time.

Thus, these studies do point out, that while their implementations were administratively-directed, there is room for recommending that curriculum

implementation frameworks provide the mechanisms necessary for addressing the particularities of the local educational environment.

ii. Process

Studies of planned change in school systems are few in number and often do not examine extensively the process by which change takes place.

Two studies (McKinney and Westbury, 1975; Smith, 1981) provide some characteristics of change from an internal perspective. Two additional studies of change within a school system examined influences on change from external perspectives. Berman and McLaughlin (1979), in an exploratory study of five school systems, classified school systems' capacities to carry out planned change. Rosenblum and Louis (1981), in a study of a U.S. Federal innovation project in ten rural schools for comprehensive internally-developed projects found that most schools chose in favor of less demanding innovations because local planners were unable to describe the innovations to the satisfaction of funding agencies.

While none of these studies contributed greatly to understanding the nature of the implementation process itself, functions influencing the planned changes were identified. Unanticipated critical events were found to be a critical influence on the curriculum implementations (Rosenblum and Louis, 1981). Fullan (1982) commented that, "Such events - leader and teacher turnover, strikes, budget costs, and other descriptions can be normal fare over any three or four year period". The requirement of institutional support for planned change, particularly the support of the

administration was found to be a factor in implementation (McKinney and Westbury, 1975; Berman and McLaughlin, 1979). The McKinney and Westbury forty-year study of seven innovations in the Gary Indiana school system found that approval and deliberate support from school authorities at all levels of the organization were necessary for any implementation to survive in the long run. The role of internal funding and the means of securing it has not been prominent in the literature. The Gary Indiana study found, however, the preferences of those who controlled the funding to be a major factor in sustaining implementation. School systems appear to have different capacities in supporting planned change; they also experience considerable uncertainty about which functions contribute to or retard the process. Also, it was found that in order for implementations to have influences on the school system, many years - usually three to five, are required for the process.

The process studies noted have as their focus the user of the implementation, and thus emphasize the needs, concerns and conditions of the local classroom and school levels.

Thus, as compared to Section C, research in Section D that more directly and actually relates to managerial and process curriculum implementations represents an attempt to move from *theory* to *operation* in curriculum implementation. This direct research, while scarce in comparison to that of the 'operational', represents the process of developing what Leithwood (1986) calls 'procedural knowledge' in planned educational change by developing empirical and model-referenced

categories and functions significant to the implementation of new curricula in particular locales.

E. On Studies *Ex Post Facto*

In this study, part of the process in diminishing the gap between theoretically and operationally-based data on curriculum implementation involved use of the *ex post facto* research design. This design helped to bridge the gap between the techniques of naturalistic observation and those of experimentation (Lathorp, 1969). In the context of educational research, *ex post facto* means 'after the fact' or 'retrospectively' (Cohen and Manion, 1985). It is research which sets out to compare, to determine the reason for existing differences in the behavior or status of groups of individuals. Both the effect, and the alleged cause have already occurred, and are studied by the researcher in retrospect (Gay, 1981).

Relevant to this study, the groups were those that helped to create and operationalize the Leithwood and the Assiniboine South implementation models. The research, referencing the 1982 Leithwood and the 1983 Assiniboine South implementation models to the Grade IX Canadian Studies implementation, investigated and explained the curriculum categories and functions of each model as per their their degrees of relevance in addressing the needs, concerns and conditions of a particular educational environment. Thus, this study was more concerned with the 'comparative' rather than the 'causal' aspects of curriculum implementation.

A major concern with this study was the issue of 'distant-memory' - the capacity of subjects interviewed to recall accurately the components of past events. The subjects in this study needed to contend with a time lapse of up to seven years affecting their retention. Hilgard and Atkinson (1967) stated that the most usual form of the retention curve is that of rapid forgetting at first, followed by slower stages of memory loss. The researchers went on to explain that traditional explanations of forgetting included: passive decay through disuse; systematic distortions of the memory trace, i.e., biological incapacity to remember; interference effects (retroactive and pro-active inhibition); and motivated forgetting, e.g., as from repression. Laird (1967) found that memory powers, for young and old alike, are aided by: having confidence that you can remember; deliberately trying to remember; understanding clearly; tying in with older memories; making mental pictures; not overcrowding your memory; using recall often; and making remembering pleasant and interesting. This study responded to Laird's (1967) research by aiding the Subjects' accurate recall of the 1983 curriculum implementation through: reference to the Assiniboine South policy on curriculum implementation, and to its time-line and task schedule; using the interview technique for data collection - Borg and Gall (1979) commented that this technique provides objectivity, depth and the opportunity for gathering valuable data; choosing only those subjects who had direct experience in the 1983 Canadian Studies implementation; making the interview fairly task-oriented, i.e., focused on the specific implementation; dealing with one question at a time so as to match the logical sequence of the actual implementative events; using the same basic

interview guideline for all Subjects interviewed, making it easier to cross-reference responses; providing Subject confidentiality, and thereby increase the Subjects' ease in responding; and in making the interview as pleasant and interesting as possible - by explaining the purpose of the interview, by offering a copy of the study's results to each interviewee, and by expressing gratitude to the interviewee for his anticipated contribution to this study.

Lack of control existed in that the researcher was unable to manipulate the independent variable (Leithwood model), and randomize his subjects (Assiniboine South personnel); classifying subjects into dichotomous groups was not possible; there existed a danger in interpreting the data, i.e., in not attaching generalization, judgement, prediction and causality to the data; data collection was limited to a low sample number; and 'distant-memory' brought on by a seven-year time lapse threatened the accurate recall of the sample.

However, the 'lack of control' issue, while relevant, was more applicable to a 'cause-and-effect' than to a 'direct reference' study such as this. The groups involved in this study were initially different, i.e., Ontario versus Assiniboine South personnel, but were treated 'identically'. Also, it is important to note that some significant similarities between the groups did exist, i.e., both groups were teachers and administrators involved in the task of curriculum implementation. The sample, while small, was made up of subjects who had several years of teaching experience in Manitoba schools, and who were quite familiar with the present and former Social Studies programs. Thus, the researcher did not

feel that this 'lack of control' hampered the study in investigating the relevance to local needs of the Leithwood and Assiniboine South curriculum categories and functions. The study's findings were confirmed through the cross-referencing of data with the subjects involved.

In spite of the noted difficulties, many well-designed *ex post facto* studies, e.g., Christie and Oliver (1969), and Galloway (1984), have provided valuable research to the field of education. Because of the particular characteristics of this study, e.g., prior occurrence of the Canadian Studies implementation; need to preserve the implementation's authenticity; artificiality was not introduced to the study's design; and the design provided a fruitful source of hypotheses that could subsequently be tested in the experimental mode, the literature and research of the *ex post facto* design was deemed appropriate for this research study.

The literature and research in Chapter II have helped to identify, compare, and contrast the managerial-fidelity (1982 Leithwood), and the mutual-adaptation process ((1983 Assiniboine South) curriculum implementation models. The curriculum categories and functions critical to the design of both models were referenced to their relevance in addressing the needs, concerns and conditions of a local educational environment. The 'parallel' presentation of data associated with each theoretical and practical model significant to this study has shown that, while managerial-fidelity models differ with regard to their foundations, assumptions, methodologies, and intents in implementation as compared to those of the mutual-adaptation process model, similarities between the two

do exist. Both models seek to implement curricula from a 'top-down' approach, and both, to some degree, utilize the categories and functions of the other. The striking difference between the two, however, is the priority that each places in adopting an internal perspective to the user affected by, and involved in, the curriculum implementation. The literature and research in this chapter consistently leaned to the frequency, and recognition of the value in curriculum categories and functions addressing themselves to the needs, concerns and conditions of local educational environments.

At this point, the task of this study was to design the methodology to be used in investigating the specific curriculum categories and functions of the 1982 Leithwood and the 1983 Assiniboine South implementation models as referenced to their degrees of relevance to the local characteristics in the 1982-85 Grade IX Canadian Studies implementation in the Assiniboine South School Division.

Chapter III

RESEARCH DESIGN AND METHODOLOGY

In this chapter the design and methodology used in this study are discussed under the following headings:

- A. The Research Design;
- B. The Research Rationale;
- C. The Sample;
- D. Data Collection Methods and Instruments; and
- E. Data Analysis.

A. The Research Design

This study's design began with specific observations and progressed toward general patterns. The researcher attempted to understand the multiple inter-relationships among components that emerged from the data without making prior assumptions about linear or correlative relationships. For the most part, achieving this study's purpose required the use of an interview schedule for school administrators (Appendix E), and another for classroom teachers (Appendix F). These interviews were based on, and reflected, the content of Leithwood's 1982 curriculum model. While the

interviews were adapted to suit the position of the person being interviewed, no changes in content and organization were made to this model as shown in Table 1.

TABLE 1

SKILLS IN CURRICULUM MANAGEMENT

Categories	Implementation Behaviors
I. Planning	<ol style="list-style-type: none"> <li data-bbox="261 1005 1360 1104">1. Identify the current curriculum goals of the province and the school system. <li data-bbox="261 1131 1360 1230">2. Identify social, economic, and political trends relevant to goals and processes of curriculum implementation. <li data-bbox="261 1257 1240 1293">3. Predict the effects of noted trends on the goals and processes. <li data-bbox="261 1320 1360 1482">4. Design a planning strategy falling at an appropriate point between comprehensive and prescriptive, and incremental and remedial decision-making extremes. <li data-bbox="261 1509 1256 1608">5. Apply the planning strategy to the generation of an alternative conceptual framework for curriculum implementation. <li data-bbox="261 1635 1360 1736">6. Identify and apply appropriate operational criteria to the selection of an optimum implementative/conceptual framework.

II. Organizing

1. Identify skills required to diagnose implementation goals; and obstacles to their achievement.
2. Identify skills required to design and apply strategies to overcome obstacles to goal achievement.
3. Identify skills required to determine whether obstacles have been overcome and goals achieved.
4. Identify people possessing organizational skills.
5. Develop decision-making structures, compatible with the organization, to: facilitate exercise of organizational skills.
6. Estimate curriculum implementation costs and allocate resources appropriately.

III. Supervising

Collect and use information related to:

1. Goals for curriculum implementation re. the continuing appropriateness of selected implementation goals; the extent to which implementation goals are being achieved by the system; and the need to modify implementation goals as warranted.
2. Strategies for curriculum implementation re. the effectiveness of implementation strategies and accuracy of identified obstacles to goal achievement; the effectiveness of decision-making structures in facilitating curriculum evaluation; and the need to modify evaluation procedures and decision-making structures as warranted.

3. Personnel involved in implementation re. the effectiveness of personnel in implementing curricula; the curriculum implementation training needs of these personnel; and the need to provide curriculum implementation training and/or reallocation of personnel as warranted.

IV. Communicating

1. Design and transmit ongoing communications about progress toward goals for curriculum implementation; emerging curriculum implementation processes; and emerging decision-making structures.
2. Design and implement procedures for collecting reactions to the ongoing status of curriculum implementation in the system.
3. Continuously refine goals; and curriculum implementation processes and decision-making structures as warranted.

Source: Leithwood, 1982, pp. 280-284.

This study's design was comprised, basically, of five stages. The first stage consisted of the researcher making observations of three Canadian Studies classrooms. The purpose of these observations was to verify that the Grade IX Canadian Studies program in the Assiniboine South School Division was in fact a 'bona fide' local implementation to which the

curriculum categories and functions of the Leithwood and Assiniboine South models were being referenced. The researcher followed Appendix G in identifying the instructional practises and program-related artifacts, and in relating these to the goals and objectives of the Canadian Studies program as set down by Manitoba Education.

The second stage involved tracing what Berman and McLaughlin (1979) called the 'implementation path' of the implementation process. This study's collected data was reviewed and referenced to stages and events having occurred during the Canadian Studies implementation, and was used to construct an outline on the course of that implementation as related to the Leithwood (Chapter IV, Section B), and the Assiniboine South (Chapter IV, Section C) implementation models. Appendices C and D structured the generation of data from the interviews. In addition, the data received from the documentary analyses, and member checks helped to fill in the Canadian Studies 'implementation path'. Thus, the groundwork for the analysis, and synthesis of the 'parallel' presentation of data for the study's two models was constructed. The emerging profile of the implementation according to the 1982 Leithwood, and the 1983 Assiniboine South models became apparent during this stage.

The third stage of the design identified those categories and functions from the 'implementation paths' critical to the Leithwood and Assiniboine South curriculum models. Table 2 was constructed, and the categories and functions critical to each model were then designated as 'relevant' or 'non-relevant' to the 'locally-sensitive' Canadian Studies implementation in

Assiniboine South. These variables were also referenced to 'administrative involvement' (Appendix I).

In the fourth stage, the findings generated from all of the collection instruments and sources were analyzed and synthesized according to the relationships of the curriculum categories and functions *within* and *between* implementational models, and most importantly, to the actual Grade IX Canadian Studies implementation. Appendix H enabled all references to the curriculum categories and functions of the two implementation models to be categorized as 'low', 'medium', or 'high' relevance to the Grade IX Canadian Studies implementation in Assiniboine South.

In the fifth stage, the study's findings, conclusions, implications and recommendations were based on the foundation constructed, and the findings generated from the first four stages in this study's design.

B. Research Rationale

Immediately upon beginning the interview process, it became apparent that the rationale for this study needed to be modified (from an investigation into the "levels of congruency" of the implementation behaviors between actors involved in implementations with the Assiniboine South and Leithwood models to "references of the curriculum categories and functions critical in the design of the Leithwood and Assiniboine South models to the Grade IX Canadian Studies implementation in Assiniboine

South". In making these references, the researcher of this study adopted a particular focus: to classify the degree to which the curriculum categories and functions of each model related to the specific needs, concerns and conditions of the particular educational locale in which the Canadian Studies implementation took place.

Particular reasons were responsible for this shift. Responses from the study's interviews consistently, and predominantly pointed to the Assiniboine South implementation model as the focus and controlling factor in this investigation. The interview process also revealed that: at times, data was often unavailable - some administrators could not accurately recall the implementation process dating back to 1983; the planning process for the Assiniboine South implementation model was highly incongruous with sections of the Leithwood model; all of the Assiniboine South interviewees' responses were made with affinity and relevance to the working model they had used, i.e., with little to no connection and direct reference to the Leithwood model; and it was the researcher's perception that the Canadian Studies implementation in Assiniboine South was, for the most part, a joint rather than segregated effort of administrators and teachers in that Division.

It was therefore considered more appropriate, and fruitful to engage in a 'parallel presentation' of the implementational categories and functions critical to the Assiniboine and Leithwood models as referenced to the Grade IX Canadian Studies implementation in the Assiniboine South School Division between 1982-85. This modified rationale provided a more focused intent for the study's data collection; a more appropriate and

fruitful framework for reporting the data; and a more logical basis for concluding on the data.

The shortage of literature in providing increased specificity, clarity and definition (Leithwood, 1982) to curriculum implementation makes it apparent that a need exists for investigation into the categories and functions critical to 'locally-sensitive' curriculum implementation. Additionally, Bussis, Chittendon and Amarel (1976) expressed the need for more direct lines of inquiry into education as actually practised and experienced in our schools. And, as noted in this study's literature review, there remains a dearth of research, and presumably knowledge, on the operational activities involved in the successful implementation of local curriculums.

Thus, this study is timely in its efforts to examine empirically the degree to which the curriculum categories and functions of the Leithwood and Assiniboine South curriculum models addressed the needs, concerns and conditions of a particular educational locale. This is, to the author's knowledge, the first such reference of the components of these models to an actual curriculum implementation, i.e., Canadian Studies (1982-85). Each of the seven major categories and functions critical to these models was identified, investigated, and referenced, with the aim of creating more knowledge of the local curriculum implementation process.

C. The Sample

The subjects interviewed in this study were three junior-high principals, and five classroom teachers. Of the 11 potential subjects, two principals, and one divisional administrator declined to be interviewed with the prepared Leithwood interview schedule. While the principals cited problems with memory recall associated with the seven-year time lapse dating back to the beginning of the Canadian Studies implementation, the divisional administrator stated that "...those in the best position to report on the implementation were those school administrators and teachers involved in the 'school-based' implementation".

However, the eight subjects who agreed to participate in this study were representative of administrators and teachers having had direct experience with their divisional implementation of the 1982-85 Canadian Studies implementation; and membership in their system's Divisional, School, and Subject-Grade Contact Groups instrumental to this implementation.

The three principals, and five teachers interviewed were employed by the Assiniboine South School Division in 1982 as administrators and teachers respectively, and have continued their employment since that time in the Division. All subjects have had a minimum of nine years of experience in their School Division.

D. Data Collection Methods and Instruments

In this study, data was collected that applied to two sections: i.) the theoretical literature; and ii.) the on-site data of the actual curriculum implementation.

i. Literature

To conduct this review, two different computer searches were used. First, ERIC batch searches which covered the last thirteen years (1976 - 1989) were run on the major areas of the study. Each of the following sets of descriptors on the right were crossed with the descriptors on the left:

Curriculum Development	
Curriculum Models	
Curriculum Research	Administrative Practises
Educational Change	Administrative Processes
Educational Improvement	Administrative Tasks
Educational Innovation	
Program Effectiveness	
Social Studies	

Since 'curriculum development' is such a broad term with over 20,000 entries in RIE and CIJE, an additional search of ERIC was done using the term 'curriculum implementation'. This was not only more specific, but also covered more years. In addition, a hand-search of journals

(curriculum and administration) was made. Sources from these searches and other materials already identified were then used to locate other pertinent documents.

This work was done between June (1989) and May (1990) at the D. S. Woods (education), Albert D. Cohen (management), and Elizabeth Dafoe (main) libraries at the University of Manitoba; and at the Manitoba Education (Province of Manitoba) library.

ii. On-Site Data

After written permission to conduct this study was received from the Ethics Committee (Appendix A), and from the Assiniboine South School Division (Appendix B) in December (1990) and January (1991), the interview dates and times with administrators, and teachers having had direct experience with the Canadian Studies implementation were set up by phone. Each interview took approximately 45 minutes to complete. The teacher interviews took place in three of the Division's junior-high schools while the administrator interviews took place in the school and divisional offices, and by telephone. In order to establish that the curriculum models were being compared to a 'bona-fide' implementation, data relating to the artifacts and instruction of the Canadian Studies program was gathered through observing (using Appendix G as a guideline) the classrooms of Subjects D, E, and F. In addition, detailed and organized data on the Division's Canadian Studies implementation was gathered from the files of the 1983 Assiniboine South Professional Development Committee that oversaw the entire implementation process, and from the Divisional

offices. The entire data collection process took place in January and February (1991).

While the interview and documentary analyses methods of data collection were principally relied on in this study, those of observation, and member checks served to verify the findings by the first two methods. Of the instruments used, the administrator and teacher interview schedules (Appendices E, and F), and the Assiniboine South Professional Development Model (Appendix D) were relied on particularly in order to fulfil the primary task of this study: to present a 'parallel' presentation of the curriculum categories and functions of the 1982 Leithwood and 1983 Assiniboine South implementation models as referenced to the Canadian Studies implementation. By logical extension, Table 2 was deemed very important to this study in that it identified, and synthesized the implementational categories and functions critical to each model, and provided the foundation for this study's findings, conclusions, implications, and recommendations. In like manner, Appendix I synthesized the degree of administrative involvement in each model's categories and functions.

E Data Analysis

Data analysis had as its ultimate objective: to determine to what degree the curriculum categories and functions specific to each model were relevant in addressing the needs of the particular implementational environment in this study. To this end, data collected from the three

administrator and five teacher interviews; three class observations; documentary analyses of Assiniboine South's policy and stages of their divisional implementation; and member checks was channeled to: the degree of overall relevance of each model to the particular issues of the local implementation investigated; the degree of relevance between the models' categories as referenced to the Canadian Studies implementation; the curriculum categories and functions of both models that had sufficient relevance to the Canadian Studies implementation to be combined into a new curriculum implementation model; and the degree of administrative involvement relevant to each of the categories of each model.

In order to provide an equitable method for referencing, the critical implementational categories and functions of each model were identified, and calculated with a value weighted against their own frameworks, e.g., 'administrative support' had eight out of 24 Assiniboine South functions critical to its implementation, thereby accounting for 33.3% of that model's weighted-value. Thus, the final calculations between components of the models was a product of their relative similarities and differences to each other as referenced against the weighted-value of each model's curriculum category. As well, the percentage method of calculation respected the fact that the Leithwood model had four categories and 30 functions in comparison to Assiniboine South's three categories and 24 functions, and vice versa. As an additional method of equitable comparison, Appendix H established three equal ranges to which the numeric frequencies from the tables of both models were referenced.

It can be seen that the interpretative approach to qualitative research

provides an understanding for determining the relevancy amongst the categories and functions of curriculum implementation models critical to their successful operation in adapting to the project and institution concerned with the implementation. Since interpretative research does not necessarily seek out universal laws in explaining phenomena, it is particularly well-suited to this study in that its major goal (Smith, 1981) is to provide understanding to particular actions and meanings in particular contexts, i.e., to those 'locally-sensitive' curriculum categories and functions critical to the implementation process of the 1982-85 Canadian Studies program in the Assiniboine South School Division.

Chapter IV

DATA COLLECTION AND INTERPRETATION

This chapter will present: A.) the rationale for this study's collection and presentation of data; and this study's data relevant to: B.) the implementation process of the Leithwood (1982) model; C.) the process of the Assiniboine South (1983) implementation model; D.) the three class observations; and E.) the synthesis of the data as related to the particular needs, concerns and conditions of the Canadian Studies implementational environment.

A. Rationale for the Collection and Presentation of Data

Data was collected in order to fulfill the primary task of this study: to enable the 'parallel' presentation of the Leithwood and Assiniboine South models as referenced to the Canadian Studies implementation. To that end, the relationship and relevance of each model to the implementation was organized, reported on, and presented separately. This format was seen by the researcher to be of crucial importance in laying the groundwork for comparing the two models with particular emphasis on the capability of

each model to address the conditions, needs and concerns of a local educational environment.

In this study, the interview technique was used because data was required concerning past events, and common understanding of implementational terms was needed to ensure successful communication in data collection. The interview technique (Gay, 1981; Cohen and Manion, 1985) provided flexibility - with time constraints, and in having the interviewer adapt the situation to the Subject; high response rate - immediate feedback for the interviewer; in-depth responses - in establishing rapport, subjects were free to disclose their thoughts, feelings, and values about issues; clarity of responses - incomplete, divergent or unclear responses were followed up by additional questions or requests for clarification; and verification - the interview served as a validity check against observation, and against providing direct information. However, weaknesses of the interview technique were noted: potential for low validity - acceptance of responses on basis of face validity; and bias - undetected errors consistently made in the same direction. The steps taken to help prevent the incidence of bias and low validity were: clear wording of questions to ensure meaning; ensuring confidentiality of responses; careful recording of interviews; and re-checking and cross-checking of divergent data.

Secondly, records of the 1983 Canadian Studies implementation in the Assiniboine South School Division were used for analyses of the Assiniboine South implementation model and the Grade IX Canadian Studies implementation. An advantage to using documentary analyses was

the lack of distortion of information due to the passage of time (as compared to reliance on memory). However, to some extent, the researcher was partially limited by some omissions of past events relating to the implementational study.

The third method employed in this study was direct non-participant observation. The method was chosen to provide evidence of the implementation applied to the Canadian Studies program. Several advantages (Cohen and Manion, 1985) applied to the non-participant observation approach: the observer was able to view and record the ongoing processes firsthand and comprehensively; and the natural environment allowed the observer to develop an informal relationship with Subjects which facilitated data collection. However, the disadvantages of non-participant observation included the potential for perceptual bias on the part of the observer; and limitations as to the number and variety of stimuli to which the observer could pay attention. These disadvantages were countered by prolonged engagement at the site used to promote a high degree of acquaintance with the program, and the subjects; unobtrusive role adopted by the researcher during observations; subjects were assured of anonymity and confidentiality; observational data was checked against interview and documentary data; and data and interpretations were checked throughout the study with other Subjects from whom the data was drawn.

As a fourth measure, data was collected from personnel at the divisional and school levels by inviting them to correct perceived errors of fact, and to supply alternative explanations relating to implementation functions

applied to the 1983 Canadian Studies program. This process (Miles, 1979) helped to assure validation of the findings.

From Table 2, Appendix I and Tables 1 - 6 could then be constructed. The data from these constructs were then used to answer the study's four main research questions, and provide the bases for the study's conclusions, implications, and recommendations.

Thus this study's 'parallel' presentation of data began the process by which the curriculum categories and functions of the Leithwood and Assiniboine South models were to be referenced to the Grade IX Canadian Studies implementation. As a result, the capacity of these curriculums to relate to the needs, and concerns of a local implementation could be categorized.

B. Leithwood (1982) Implementation Model

The following highlighted specific skills and tasks make up the Leithwood model's process, and are those which serve in reference to the 1982-85 Canadian Studies implementation in the Assiniboine South School Division.

I. Planning for Implementation

i. Identification of provincial/school curriculum goals.

The Canadian Studies goals specified in the 1982 Social Studies Interim Guide (Province of Manitoba) were accepted, in their entirety, as necessary

for implementation. Subject A said that "...equal priority" was given to the program's goals during implementation, Subject B that the Canadian Studies goals "...were accepted as a provincial mandate," and Subject C that such treatment would promote "...consistency amongst staff in implementation." However, Subject D noted that there was some "...shift in emphasis" to the program's goals. Subject E noted that "...because of time", subject-grade groups "...picked three out of five optional units in the program." The mandatory units were on 'law' and 'politics' while the optional ones were on 'Canadian unity', 'economics', and 'international relations'. While Subjects F and G stated this shift in the program's goals enabled "...instruction more relevant to the events in Canada", Subject H related the program goals to Canada's "current events", e.g., Meech Lake and the Gulf War.

ii. Identification of trends relevant to the implementation.

Subject C commented that "...no outside trends were taken into account" in this implementation. The exceptions to this response were made by: Subject D - "...our school is in a traditional community and that shapes our approach to curriculum, i.e., lectures and tests"; Subject F - "...yes, multiculturalism"; and Subject G agreed that "...we instruct according to the parents' expectations."

Thus, to some extent, social, but not economic or political trends were taken into account.

iii. Prediction of effects of trends on implementation.

All Subjects responded in kind to Subject A: "...no predictions were made about any trends" in this implementation.

iv. Design of planning strategy between comprehensive-prescriptive, and incremental-remedial decision-making.

The implementation's planning strategy was perceived to be comprehensive and prescriptive. Subject B stated that the implementation strategy was based on "...teacher awareness, and unit-planning." Subject A continued that the basic plan was for "...the teachers to go through the process." Subject B recalled that those involved went through "step by step". Subject D stated that the planning was done "...by the department grade teams," that they "...prepared for units, exams, and speakers together" with "...the issues cleared with the administration for decision-making." Subject E supported this type of decision-making on his belief that "teachers know the students best."

Thus, the implementors followed the procedures and time lines set by the planning strategy.

v. Generation of alternative frameworks for implementation.

All subjects emphatically responded in kind to the responses of Subject B that the Assiniboine South framework for implementation was "...followed to the 'T'", and "...step by step" (Subject C) *at the divisional level*. Subject A noted that divisional committee members received "little to no help from outside sources" in fulfilling their mandate: "to develop a

single workable plan" for implementing the Canadian Studies program. However, Subject E pointed out that, *at the classroom level* "...different programs on the same topic" were planned for special needs and independent students "...solely under the teacher's discretion." Subjects F, G and H modified their programs according to "the interests and abilities of students", "change the order of the curriculum to suit current world events", and "appropriate print materials." Subject D felt that developing 'alternative classroom frameworks' depended on "...planning, and teacher in-services."

vi. Apply operational criteria in selecting an optimal framework.

Subject B noted that "...the two most important factors" applied to the framework for implementing the Canadian Studies curriculum were: the need for awareness sessions designed to promote teacher adoption of the curriculum; and the need for teacher knowledge, skills and practice in planning, integrating and applying Canadian Studies Curriculum units in the classroom. Subject C supported this approach in stating that the value of the implementation was its "...impact in the classroom." Subject D specified that the divisional planning committee took into account specific instructional concerns in developing the implementation model such as "...student assessment, teaching strategies, grouping techniques, and students learning styles". Subject F explained that the levels of groups served as the "...starting points for the implementation", and that "...this division was good about release time" in order to meet, discuss, work out

their implementational concerns, and prepare classroom teaching units consistent with the goals of the Canadian Studies program.

II. Organizing for Implementation

i. Diagnoses of implementational goals and obstacles to their achievement.

In order to diagnose the implementational goals and obstacles to their achievement, the Canadian Studies implementation called for the organization and development of specific groups designed to help carry out the implementation process. According to Subject C, the Divisional Contact Group was made up of nine members from the administrative and teaching staff, and had two main functions: "...to develop the divisional implementation model" and "...to act as a resource for all the other groups" of teachers throughout the program's implementation. As such, this group attended workshop training sessions in August (1982), organized teacher in-services in September and October (1982) and in January (1983), and helped form the School Contact Groups. Subject C reported that these groups were made up of 64 resource personnel, teacher-librarians, and subject-grade teachers from 13 schools in the Division and had, as their main functions to coordinate with the Division Contact Group in assisting teachers with the Canadian Studies programs at the school level, and to work with their local school professional-development committees in providing school-based in-services to their local staffs. These in-services took place in each school in the Division during February and March of 1983. Completing the organizational levels for implementing the Canadian

Studies program were the individual Subject-Grade Groups that were made up of teachers in each school offering Grade IX Canadian Studies. These teachers met regularly, once per cycle, in order to discuss and support each other regarding the Canadian Studies instructional goals and practises, resources, assignments, and evaluations, and to plan a common sequence of instruction. The goals diagnosed as relevant to Subject A were those implementational concerns identified by the assistant superintendent (Appendix C); those stages of implementation specified by the central planning committee (Appendix D); and the curriculum and instructional goals specified by Manitoba Education.

The feedback from the implementational in-services, however, generated many potential obstacles to the achievement of the implementational goals. Subject B noted that school principals categorized five factors they thought hindered the curriculum implementation: "too many changes being promoted at the same time by Manitoba Education"; "insufficient time and resources for teachers to prepare learning units and teaching materials for the program"; "teachers not being committed to the change, not being involved in decisions to implement"; "insufficient in-service education and orientation for teachers"; and "insufficient in-service support during implementation". According to Subject D, the particular obstacles diagnosed as relevant by the School Contact Groups were: "not enough planning time"; "need for better guidelines on unit planning"; "inadequate leadership from Manitoba Education on the implementation"; and "a lack of clear expectations for the Contact Groups". However, Subjects D, E, F, G, and H identified teacher's obstacles to the

implementation as "the school requirement for instructional commonality stifled individuality and creativity in instructional planning"; "there still remains no agreement amongst Subject-Grade Groups to accept an interdisciplinary approach to teaching Grade IX Canadian Studies"; "a lack of evaluation on whether classroom instruction reflected the program's goals"; " little to no teacher piloting of the program being implemented"; " no 'how to do it' support provided by school administrators"; "above the basic materials for the curriculum, there existed a shortage of resources for 'above' and 'below' ability level students"; "the text does not deal adequately with all sections of the Canadian Studies course"; "the inadequacy of the text forces teachers to spend more of their own time in Subject-Grade Group planning meetings, and in searching for their own materials"; "many of the Division's audio-visual materials are out-dated, especially with materials on post-Charter of Rights and Freedoms issues"; "more Canadian and less American materials for the Canadian Studies course"; "difficulty in getting hold of current, unbiased and integrated materials on Canadian Studies issues"; "the need for experienced teacher-mentors for beginning Canadian Studies teachers"; and "experienced, well-qualified Canadian Studies teachers felt hampered by the 'slow' implementation process of the divisional model".

ii. Designing and applying strategies to overcome obstacles.

According to Subject C, strategies used by the Superintendents' Office to overcome the obstacles to goal achievement were: to make the implementations school-based; and to establish and provide for the

underlying assumptions to the model (awareness, and unit planning). The May 3, and 4 (1984) "Conferences on Curriculum Implementation" were intended to help school principals overcome obstacles to the implementation. The Division and School Contact Groups held a number of in-services designed to help teachers move through the implementation smoothly (Appendix D). After each in-service, Subject B noted that teachers were asked to provide feedback concerns to the organizing committees. These concerns were then incorporated into future in-services and planning sessions. Subject A noted that late in 1982, the Media Center held teacher workshops on topics related to the Canadian Studies implementation: 'unit planning', 'implementation', 'integration', 'specific curriculum skills', 'resources', 'grouping for instruction', 'evaluation techniques', and 'support personnel' to help fulfill the goals of the Canadian Studies program. As an additional service, Subject D commented that Canadian Studies curriculum units submitted to the Media Center "...were catalogued to form an Idea Bank for all Canadian Studies materials in the Division". The November 30, 1982 in-service on 'Unit Planning' dealt with : Canadian Studies awareness sessions; teacher planning of units, lessons (including activities); unit implementations; correlation of units with the philosophy and rationale of the Canadian Studies curriculum; regard for individual student needs; record keeping; brainstorming for solutions (amongst all staff in individual schools) to curriculum implementation obstacles; and a chance to view and discuss pertinent curriculum guides. The January 18, 1983 in-service regarding implementation activities at the school level dealt with: level and grade

concerns; unit implementations; meeting individual student needs; integration of students and materials; time-lines for teaching the units; and any other teacher concerns pertinent to the Canadian Studies implementation.

In addition to the above opportunities helping teachers to overcome obstacles to implementation, other avenues were open: Subject-Grade Group meetings - common planning, resource help (Subject G); "one textbooks for each Grade IX student in the Division" (Subject D); a " financial priority on budgets favoring Canadian Studies materials" (Subject E); and an "...in-service priority favoring the Canadian Studies implementation" (Subject A).

iii. Identify whether obstacles were overcome and goals achieved.

The Assiniboine South divisional implementation activities did not identify any processes *per se* designed to tell whether obstacles to implementation were overcome and goals achieved. "No longitudinal studies were ever done" (Subject C). According to Subject B, these concerns were "...dealt with through discussion in teacher in-services, administration days, Media Center presentations, and administrative monitoring" of the Canadian Studies process.

At the school level, Subject D commented that "...teachers can close their classroom door to teach their own agenda" - making it difficult to tell whether or not obstacles were overcome, and curriculum goals were being achieved. However, Subject E commented that "...tests, student progress,

and general teacher impressions" helped to give feedback on the program and the students. Subject G referred to the common teacher-planning sessions as having "...a resource and supportive function" in instruction, materials, program philosophy, and evaluation for the concerned teachers. Subject G noted that in these ways, the obstacles associated with the Canadian Studies program continue to be addressed.

iv. Identify people possessing organizational skills.

According to Subject B, the nine members of the 1982 Assiniboine South Professional Development Committee automatically assumed organizational tasks relevant to the Division's implementation model, i.e., they were 'pre-identified'. At the school level, a memo (June 3, 1982) from the assistant superintendent of programs identified the process under which School Contact Members were to be grouped for provincial and divisional in-servicing on the Canadian Studies program. Subject A believed school principals were to "...nominate or volunteer teachers" from the following groups: resource personnel; teacher librarians; and junior-high Social Studies teachers.

Finally, Subject D stated that all of the regular Grade IX Social Studies teachers "were obligated to meet as Subject-Grade Groups for purposes of helping to organize instruction for the new program".

v. Develop structures to develop organizational skills.

The decision-making structures relative to the Assiniboine South implementation model and to the Canadian Studies implementation according to Subject B were: the executive-administrative committee (the Superintendents' Department) as the ultimate divisional authority to which the implementation's actors could make reference; the nine-member Divisional Professional-Development committee; the School Contact Groups; the Subject-Grade Groups in each school; and the department-head and principal administrative structure in each of the schools implementing the Canadian Studies program. Subject D noted that these structures within the organization "...gave opportunities for every Canadian Studies teacher in Assiniboine South" to make implementational decisions as per the divisional model.

vi. Estimate implementation costs and allocate resources.

The estimated cost of implementing the Canadian Studies program was piloted from the office of the assistant superintendent in charge of programming (Subject B). The divisional cost for substitute teachers filling in for regular Canadian Studies teachers on in-services totalled \$2700.00 with an additional \$900.00 cost shared amongst the participant schools (Appendix D). Subject D said that "...in keeping with Assiniboine South School Board policy, each Grade IX student in the Division received a text for the Canadian Studies program from day 1", and the expense for these texts was "covered by divisional seed money". Subject H noted that during the implementation period from 1982-85, the Division made the

selection of instructional materials at the divisional Media Center a priority. Once the priority for the provision of textbooks and in-services was met, each school was responsible for assuming, and sharing their responsibilities for the implementation from its yearly per capita-based block budget (Subject G). Out of this block budget came the allotment for each school's Social Studies department. In addition, Subject G noted that a good portion of the library budget was spent on print and audio-visual materials in each of the schools handling the implementation.

Hence, all schools implementing the Canadian Studies program were provided with the basic textbooks and other instructional materials from financial grants at the divisional and school levels. Subject E noted that these "basic and supplementary materials, field trips and speakers" were allocated "equally to all Grade IX students". Any cost over-runs beyond the limits of the grants allocated for this implementation were absorbed by the Division (Subject D).

III. Supervising for Implementation

Collect and use information related to:

i. Goals for curriculum implementation:

- i.) appropriateness of selected goals;**
- ii.) extent the system is implementing goals; and**
- iii.) modification of implementation goals as warranted.**

Divisionally, the goals of the Assiniboine South implementation model were seen by all teachers and administrators interviewed as appropriate to the Canadian Studies implementation. Subject A said that "...the process

and deadlines were set, administrators were to monitor", and "...those involved went through the process". Furthermore, "...each individual school was monitored in isolation" but was generally seen to be "a successful model". While none of the implementation goals were changed, Subjects D, E, F, G and H all stated that, at the classroom level, some program goals were prioritized, and others were de-emphasized. While those goals connected to the units on 'law', 'government', and 'multiculturalism' were made compulsory for study, those related to 'international affairs' and 'basic geography' were made optional. According to Subject E, these modifications were made on the basis of "teacher's decisions and student's abilities and attitudes". But, Subject A reported that there existed "...little to no evaluation at the school and divisional levels". Rather, Subject D said that information on curriculum goals was collected through in-service discussions, School Contact Group meetings, and through Subject-Grade Group meetings. As an overall reference to the program, Subject D noted that the 1984 Provincial Assessment was taken into consideration as a basis for initiating instructional improvement.

ii. Strategies for curriculum implementation:

- i.) effectiveness of strategies and identifying obstacles;**
- ii.) effectiveness of decision-making structures in facilitating curriculum evaluation; and**
- iii) modification of evaluation procedures and decision-making structures.**

According to Subject A, the Division mandated that the implementation be school-based. The Assiniboine South model predetermined the in-services and stage time-lines with local school administrators supervising the stages of implementation according to its time-lines. Since each school principal was responsible to the assistant superintendent-programs regarding the model's formal expectations, the teachers and department heads reported all implementational decision-making to their school principals. Subjects (administrators) A, B and C initiated no changes to the implementation model, and made no formal evaluation of the model or its processes. Subject D thought administrators "saw the implementation as a 'project' to be completed". While administrators and teachers did identify numerous obstacles to the implementation, none were evaluated for their threat to the implementation (Subject C). Rather, Subject B noted that "the obstacles were discussed and worked out during the teacher in-service section of the implementation model". Subjects D, E, F, G and H all expressed satisfaction with the opportunities to make decisions, discuss issues through the divisional and school in-services, and the Subject-Grade Group meetings (referred to as being especially 'resourceful', and 'supportive' by Subject G).

On a classroom basis, Subject E identified the strategies of "...testing, group work, and class presentations" in identifying obstacles and facilitating curriculum evaluation. Subject E noted that "...given the variety of students, this process continues". Some of the classroom obstacles noted by Subjects D, E and G were "...an increase in behavior-disordered kids in the classroom, taking away time from the regular kids",

"lack of motivation by some students", and "difficulty in getting some students interested in current affairs". Subject E noted that change to the classroom evaluation structures was "often spontaneous, for example the social and economic ramifications of the Iraq war".

iii. Personnel involved in implementation:

- i.) effectiveness of personnel in implementing curricula;**
- ii.) curriculum implementation training needs of personnel; and**
- iii.) provision of training and/or reallocation of personnel.**

At all levels, there existed little to no evaluation of the personnel involved in the implementation. Subject A also noted that "few checks and balances existed in the entire process, except that principals acted as facilitators in providing teachers with the resources needed to expedite the implementation process, and as monitors in supervising the activities related to particular time-lines". The personnel involved in this implementation were expected to participate in and follow the model as designed. A limited amount of facilitator training was available to the School Contact Groups, and divisional administrators (Appendix D). Training for teachers was limited to in-service workshops on the implementation while Subjects D, E and F received some training and experience from piloting the Canadian Studies program at a local junior-high school the year before it was officially implemented in the Division. According to Subject A, "...no staff involved in this implementation were reallocated".

In the classroom, Subjects D, E, F, G and H gauged the effectiveness of student participation according to "the end product - tests, projects, presentations and discussions". Subject D noted that the program previously was piloted in three classes the year before and "therefore students knew about the implementation". Subject F commented that all Grade IX students were assigned the Canadian Studies program, and were placed according to "levels of ability" with 'special' students mainstreamed "...often with the help of a teacher aide".

IV. Communicating for Implementation

i. Design and transmit ongoing communications about:

- i.) progress toward goals for curriculum implementation;**
- ii.) emerging curriculum implementation processes; and**
- iii.) emerging decision-making structures.**

According to Subject B, communication on the progress of the implementation occurred principally through the School Contact Groups, and teacher feedback during and after implementation in-services. At the school level, Subject-Grade Group meetings were the vehicles used by teachers and department-heads to make sure that all personnel had access to the information on the implementation model and its current status. Progress on the school's implementation was also evaluated according to administrative inspections in teacher's classrooms (Subject D). The incremental stages of development for the Canadian Studies program, and the opportunities to make decisions with others in this implementation were tied together in communicating the on-going progress of the

implementation, and were seen to "...give the message that teacher's suggestions are important" (Subject H).

ii. Design and implement procedures for collecting reactions to the curriculum implementation.

Subject A commented that the Division and School Contact Groups "held divisional and school meetings, while principals picked up on feedback regarding 'on-site' implementation problems". "These meetings were to make sure people had input in the process." As well, Subject-Grade Group teachers met regularly to collect teacher reactions and "...iron out concerns", (Subject F) of the Canadian Studies implementation. Subject E noted that teachers also initiated discussions and course evaluations with their students in collecting reactions to the on-going implementation.

iii. Continuously refine:

i.) goals; and

ii.) implementation processes and decision-making structures.

While the goals for the Canadian Studies program in the Assiniboine South implementation did not change, they were refined (adapted) to the particular characteristics of each teacher's classroom "on the basis of staff communications" (Subject D). Subject B noted that increasingly, implementors were given more encouragement and opportunity to communicate their then-current implementational concerns. As needed, the

decision-making structures, i.e., in-services and feedback mechanisms, School Contact, and Subject-Grade Groups made greater allowance for implementors to discuss and solve their problems with the implementation, and to receive support in proceeding according to the model's stages and time-lines. According to Subject D, teachers continue "to have healthy Grade-group discussions, and pin-point on each others good lessons and techniques".

C. Assiniboine South Implementation Model: Implementation of the Canadian Studies Program

The purpose of this section was to present the implementation process of the Canadian Studies program with critical reference to the 1983 Assiniboine South implementation model.

This data was organized in two sections: i.) the conditions necessary for successful curriculum implementation according to Assiniboine South Professional Development Committee (Appendix D); and ii.) an explanation of the six stages and respective implementation functions outlined in this model.

I. Conditions for Successful Implementation

Assiniboine South's curriculum development framework (Appendix D) represents a structure within which the Division's traditional responsibilities (as specified by Manitoba Education) for curriculum

implementation were fulfilled. The forum for planning this model, and its implementation was the Divisional Contact Group, i.e., the Divisional Professional Development Committee of the Assiniboine South School Division. The data received from the committee's curriculum implementation researching and brainstorming activities served as the basis for developing the divisional implementation model not only comprehensive in its 'stages of development', but also in its prescription of the 'procedural functions' relevant to the implementational process. The committee's model reflected Assiniboine South's policy on curriculum implementation (Appendix C): "the most important unit for change is the individual school" with change needing to occur *in the classroom* ; a program's adoption must precede its implementation; instructional practises basically include the teacher-student classroom interaction; the new program must be adapted to meet the needs, expectations and values of the users; and the "...school administrator is the single most important individual affecting program implementation". The model's planning committee identified two important points from which the implementation must begin: the framework of the Divisional and School Contact Groups, and a unit planning base. Subject B said that members felt "...these starting points would provide teachers with an awareness of the new program"; a "...forum within which to discuss" the educational changes and their instructional implications; and knowledge and practise in "...preparing materials for the new program" - activities the Committee felt would promote the program's adoption and maintenance.

The committee structured the Grade IX Canadian Studies implementation into six stages of development (Appendix D). The Division's Professional Development Model was utilized by the Division's Professional Development Committee for the implementation of the Grade IX Canadian Studies program.

II. Stages and Activities in Implementation

i. Stage I - (April, 1982) - Organization

The Assiniboine South 1982 Professional Development Committee, became the Divisional Contact Group and was responsible to Assiniboine South's assistant-superintendent responsible for programming. As this group identified the Division's short and long-range implementation functions, individual School Contact Groups made up of teacher librarians, resource and classroom teachers were formed within each school in the Division. The central committee felt that all those responsible within the school for the education of the student would be involved with the Canadian Studies implementation.

ii. Stage II - (September, 1982) - Program I - Awareness Sessions (Contact Groups)

The first awareness sessions for the Canadian Studies program took place from August 24-27 of 1982. This Manitoba Education training session was aimed at extending the participant's understanding and expertise in the following areas: the content of the curriculum guides; the techniques of conducting workshops; and planning and preparing materials

for specific sessions. Members of the Assiniboine South Professional Development Committee attended this workshop. Later, (May 3-4, 1984), Manitoba Education held another awareness and training workshop for the facilitators of the implementation. The objectives of this workshop were to promote interaction on a divisional and regional basis among teachers, administrators, trustees and curriculum committee members; provide an opportunity for workshop participants to analyze, and prioritize concerns regarding curriculum implementation; and provide a simulated experience in dealing with curriculum implementation issues. Again, this session was attended by Assiniboine South administrators, and teachers.

In order to provide for a better understanding of the intended curriculum goals, the Professional Development Committee believed that it was necessary to have the School Contact Groups take part in an implementation awareness workshop concerning the philosophy and rationale of the Canadian Studies program. However, in order to prepare each School Contact Group for the "Philosophy and Rationale" in-service, it was agreed that individual central planning committee members would familiarize each School Contact Group with the aims of the divisional implementation model no later than September 24, 1982.

Subsequently, (on Thursday morning, September 30, 1982), the Provincial Social Studies consultant (Manitoba Education) presented a workshop on the philosophy and rationale of the program to the School Contact Groups. Two groups of 32 teachers each received two 90 minute presentations on the Canadian Studies, program to be implemented in Assiniboine South. The Division hired and paid for thirty half-time

substitute teachers, at a cost of \$900.00, to fill in for the teachers attending this session. For this (and all other in-services) the School Contact Groups were asked to fill out a questionnaire designed to assist the central planning committee with future planning of in-service activities. In so doing, the groups were asked to respond to the following concerns: "What activities or portion of today's in-service were beneficial to you?"; "If the activities presented today were not of benefit, what kinds of activities would you suggest for future in-services?"; and "Other Suggestions".

At that time, Assiniboine South's school administrators encouraged their staff members to attend the relevant Canadian Studies professional development programs given at the Provincial Special Area Group (S.A.G.) Conference on October 22, 1982.

**iii. Stage III - (October - November, 1982) Programs II, III
- Unit Planning Process - (Contact Groups)**

To succeed effectively with the implementation stage, the Committee saw a need for the Contact Groups to receive in-service training on the Process of Unit Planning. This stage recognized that one of the major functions of planning for program implementation was to provide each school with a process for changing, altering or revising instructional practises so that curriculum changes could occur. This stage reinforced the Division's position that "curriculum implementation occurs only when changes in the classroom take place" (Appendix D).

A full-day in-service (October 29, 1982) was provided for the Division's Contact Groups at a cost of \$1800.00 for the required substitute

service. The sessions featured speakers from the Faculty of Education, University of Manitoba and the Assiniboine South Professional Development Committee. These sessions focused on 'unit planning and integration', 'content and process', and 'application of unit planning'. The unit-planning and integration sessions were attended by personnel from the University of Manitoba's Faculty of Education and Manitoba Education, in addition to the Division's consultants, and teachers.

Division-wide teacher feedback received by the Divisional Committee after the October, 1982 in-service prompted that committee to continue with the process of unit planning. Thus, on Tuesday, November 30, 1982 a half-day in-service was organized for the Division's School Contact Groups at McMaster House. The program format involved the continuation of unit planning, development of activities and lessons for the units, record-keeping, and discussion of planning unit concerns. All completed units and lessons were submitted to the divisional Media Center where they were catalogued in the Teacher Center Idea Bank for sharing with other teachers.

iv. Stage IV - (January, 1983) - Program IV-Awareness Sessions (Division)

To ensure that all other teachers in the Division who taught Canadian Studies had an understanding of the philosophy and rationale of the program, Implementation Awareness Sessions were planned for January 18, 1983. School Contact Groups (organized by teacher levels - K-6, 7-9, 10-12) met with other Assiniboine South teachers to discuss common

concerns; implementation and correlation of units with program philosophy; meeting individual student needs; time-lines for teaching the respective units; kinds and numbers of activities needed to cover the desired outcomes of the lessons and the program; and professional development programs and activities at the school level. Canadian Studies teachers were asked to familiarize themselves with their relevant curriculum guide, i.e., program rationale, subject content, evaluation prior to January 18 so that in-service time could more effectively be spent on implementation concerns. After this in-service, in-school sharing sessions concerning 'philosophy and rationale', and 'unit development and implementation' were scheduled on a weekly and/or cycle basis amongst the Division's schools. In these sessions, teachers examined the 'structure' of the units presented, i.e., topics related to student pre and post assessments, record keeping, resources, teaching strategies, special needs curriculum development, and classroom applications. Teachers in the Division who had previously been involved in workshops on the noted topics attended alternative professional development programs, i.e., individual school programs.

**v. Stage V - (February, 1983 - September, 1985) -
School Professional Development**

Once all the Canadian Studies teachers had the opportunity to participate in the Implementation Awareness Sessions, and the School Contact Groups were in-serviced on the Process of Unit Planning (and had prepared units designed to correlate closely with the philosophy of the program), it was

decided by the Divisional Professional Development Committee that the major responsibility for providing professional development implementation activities would shift to each individual school in the Division.

The individual School Contact Groups, together with the school administrations and their school professional development committees, were then in a better position to provide professional development support for their own teachers. In January and March of 1983 and in September of 1985, half-day school professional development sessions on the implementations were made available to Canadian Studies teachers. These in-service sessions related to unit planning and content integration, application of unit planning in the classroom, content and process concerns, and structure of the program's units.

vi. Stage VI - (1983 - 1986) - Teacher Center Workshops

The School Contact Groups were then requested by the Divisional Professional Development Committee to recommend that related workshops be delivered through the Assiniboine South Teacher Center during the period remaining in the implementation. These workshops, beginning in 1983, centered on evaluation, grouping techniques, learning styles, teaching strategies, parent in-services, grade meetings, and administrative-supervision concerns - all of which related to the Canadian Studies curriculum implementation.

D. Class Observations

In order to verify that the Grade IX Canadian Studies program was successfully implemented, this study included the observations of three Canadian Studies classrooms (those of Subjects D, E, and F) with particular reference to the instructional practises, and classroom 'artifacts' in each. Appendix G is highlighted to serve as a framework for reporting on the three classroom observations.

i. Program goals and lessons taught.

The Subject D class concentrated on Canada's basic geography, unifying forces and challenges (Unit II); that of Subject E the political processes of Canadian society and opportunities for citizenship participation (Unit III); and that of Subject F the legal processes and laws governing Canadian society (Unit III).

ii.(a). Learning objectives and program goals.

In the Subject D.class, students were asked to identify unifying forces within Canada, and those that challenge Canada's survival as a nation (knowledge); gather, interpret and evaluate data from diverse sources (thinking and research); and, discuss and evaluate the forces which help to unify and challenge Canada as a nation (social participation; and attitude and value).

In the Subject E class, students were asked to recognize the three levels of government and describe the function of each (knowledge); relate the

development of Canadian government to the British democratic system (thinking and research); and discuss how government affects the daily lives of individuals (attitude and value).

In The Subject F class, students were asked to recognize the role of the police in the Canadian legal system, as well as the purposes of our penal system (knowledge); examine their own attitudes regarding present methods of punishing young offenders, and reflect on the relationship between a crime and its punishment (attitude and value).

(b). Student participation and the program.

In the three classes observed, student participation included note-taking, discussion, and group planning in the Subject D class; note-taking, brainstorming, and discussion in the Subject E class; and guest speaker (lecture, question and answers) and research activities in the Subject F class.

iii. Teaching techniques and program objectives.

The teaching techniques of giving notes, class discussion, and having students plan for assignments in groups in the Subject D class involved the program objectives of 'knowledge', 'social participation', 'attitude and value', and 'thinking and research', respectively. In the Subject E class, the teaching techniques of giving notes, using brainstorming activities, and class discussion involved the program objectives of 'knowledge', 'thinking and research', and 'attitude and value' whereas in the Subject F class, the techniques of lecturing, question and answer, and research involved the

program objectives of 'knowledge', 'thinking and research' and 'attitude and value'.

iv. Measurement of student development.

The techniques for measuring student development in the three classes observed, i.e., Subject D - group projects; Subject E - term test; and Subject F - written assignment, were arranged by the individual teachers involved (in consultation with their Subject-Grade Group members), and were designed and used to measure student's learning of their program's objectives.

v. Teacher delivery of curriculum.

Subjects D and E delivered the observed lessons on their own, whereas Subject F had a guest speaker for his lesson. However, Subjects D and E noted that they used guest speakers throughout the year in their classes, e.g., Members of Parliament, Manitoba Youth Center counsellors.

vi. (a). Use of Canadian Studies resources (artifacts).

In each class observed, the text Canada Today (1988) was used as the main and basic resource. Additionally, in the Subject D class, library print materials on Canada's basic geography and economic factors were signed out by students for their project assignments; in the Subject E class, copies of the Government of Canada publication (1980) How Canadians Govern Themselves by E. Forsey were made available to students for their term test; and in the Subject F class, a text by the Reader's Digest Association

(1989), Legal Question and Answer Book was used for its relevant material on the Young Offender's Act.

(b.) Availability of Canadian Studies resources.

All Subjects observed commented on the difficulty in finding relevant and interesting instructional materials that could supplement the main resource (the Canada Today text). Subject D commented that "...some audio-visual resources were available from the Assiniboine South Media Center and from the Manitoba Education library though these resources are generally outdated". Subject E regularly collected and used materials from the provincial and federal governments which he then shared with other teachers, and Subject F noted he relied on magazine articles - Canada and the World, Canadian Geographic and Horizon Canada; newspapers - the Winnipeg Free Press; community print materials - Youth Law (Community Legal Education Association); and atlases and maps purchased from the departmental budget for instructional materials.

vii.(a). Program-community linkage.

The Subject D class identified local, provincial, and federal influences on Canadian unity; references were made to Assiniboine South's local School Board, Winnipeg's City Council, Manitoba's provincial and Canada's federal governments in the Subject E government class; and a local community speaker employed at the Manitoba Youth Center gave a presentation on the federal Young Offenders Act in the Subject F law class.

(b). Student assignments in the community.

Only in the Subject F class were students given particular assignments that would involve community contact. The classes of Subjects D and E involved student work in the classroom and school library.

The class observations of the three Canadian Studies teachers (Subjects D, E and F) consistently revealed instructional practises, and classroom 'artifacts' directly related to the goals of the Grade IX Canadian Studies program as specified in the Manitoba Education Grade IX Social Studies Guide (1983).

D Synthesis of Data Presented: Relevance To The Canadian Studies Implementation

The implementative functions directly related and critical to the Leithwood (categories and functions i.-iv.), and Assiniboine South (categories and functions v.-vii.) models have been listed in Table 2. Each model, with its critical curriculum implementation categories and functions (Leithwood - 4 categories, 30 functions; Assiniboine South - 3 categories, 24 functions), is referenced to the Canadian Studies implementation in order to make apparent the similarities and differences between the two models. Thus, a "-" symbol (indicating non-relevance) or an "X" symbol (indicating relevance) after a critical function illustrates whether that function of the Assiniboine South or the Leithwood model has a working

relationship with the Canadian Studies implementation. It was from the foundation set down by this matrix that the summary of findings, conclusions, implications and recommendations for this study have been addressed.

TABLE 2

**IMPLEMENTATIONAL CATEGORIES AND FUNCTIONS
RELEVANT TO THE CANADIAN STUDIES IMPLEMENTATION**

Categories and Functions

Relevance-Non-Relevance

I. Leithwood Model:

i Planning:

- | | | |
|--|---|---|
| 1. identify goals | X | |
| 2. identify social/economic/political trends | | - |
| 3. predict effect of trends | | - |
| 4. design planning strategies | X | |
| 5. design alternative framework | | - |
| 6. apply operational criteria | X | |

ii. Organizing

- | | | |
|--|---|---|
| 1. identify tasks in implementing goals | X | |
| 2. identify obstacles | X | |
| 3. strategies to overcome obstacles | | - |
| 4. evaluate to see if obstacles overcome | | - |
| 5. identify staff with organizational skills | | - |
| 6. organize decision-making | X | |
| 7. estimate implementation costs | X | |
| 8. allocate resources | X | |

iii. Supervising

Collect information related to:

- | | | |
|---------------------------------------|---|---|
| 1. appropriateness of goals | | - |
| 2. monitoring of goal implementation | X | |
| 3. modify goals | | - |
| 4. effectiveness of strategies | | - |
| 5. accuracy in identifying obstacles | | - |
| 6. effectiveness in decision-making | X | |
| 7. modify decision-making/evaluations | | - |
| 8. effectiveness of personnel | | - |
| 9. provide for training needs | X | |
| 10. reallocate personnel | | - |

iv. Communicating

- | | | |
|--|---|---|
| 1. progress toward goals | X | |
| 2. emerging implementation processes | X | |
| 3. emerging decision-making structures | X | |
| 4. collect reactions to implementation | X | |
| 5. refine goals | | - |
| 6. refine implementation/decision-making | | - |

II. Assiniboine South Model

v. Model Development:

- | | | |
|--|---|---|
| 1. 'implementation' defined | X | |
| 2. activities organized into stages | X | |
| 3. utilized time-lines | X | |
| 4. incorporated classroom and
instructional concerns | X | |
| 5. initiated from central planning committee
of teachers and administrators | X | |
| 6. analyzed implementational data
in devising model | X | |
| 7. took comprehensive inventory of own
locale prior to model development | | - |
| 8. model specific to needs of own locale | X | |

vi. Staff Development and Participation

- | | | |
|--|---|---|
| 1. comprehensive grouping of teachers | X | |
| 2. facilitator-training sessions provided | | - |
| 3. emphasis on awareness and unit-planning | X | |
| 4. local materials development | X | |
| 5. evaluation of in-services and
implementation processes | | - |
| 6. allocation of staff responsibilities | X | |
| 7. communication and staff development
prioritized as vehicles critical to progress | X | |
| 8. opportunity to discuss and
work out concerns | X | |

vii. Administrative Support

- | | | |
|--|---|--|
| 1. operational costs provided for | X | |
| 2. teacher release time provided | X | |
| 3. promoted/managed sharing of
instructional planning units | X | |
| 4. teacher-center continuation of
program-related in-services | X | |
| 5. utilization of local/external
consultants and administrators | X | |
| 6. initiated organization of divisional
implementational groups | X | |
| 7. allocated instructional resources | X | |

8. held frequent and regular
staff meetings on implementation X
-

While the data in Chapter IV is presented separately for each model in order that a 'parallel' reference between the Leithwood and Assiniboine South curriculum implementation models could be made to the Canadian Studies implementation, the above table served to: synthesize the data presented for these two models; and establish a means for referencing the Leithwood and Assiniboine South models to the 1982-85 Canadian Studies divisional implementation according to the curriculum categories and functions critical to each model.

Chapter V

SUMMARY, CONCLUSIONS, IMPLICATIONS AND RECOMMENDATIONS

A. Summary of Findings

The parallel presentation of the Leithwood and Assiniboine South implementation models and their reference to the Grade IX Canadian Studies implementation generated data addressing the principal task and questions of this study noted in Chapter I. Because these questions serve to focus and organize the data generated, they are highlighted so as to emphasize each category of data.

1. Overall, what was the degree of relevance in the curriculum categories and functions of the 1982 Leithwood and the 1983 Assiniboine South curriculum implementation models when referenced to the Canadian Studies implementation?

i. Assiniboine South Model to the Canadian Studies Implementation

Table 3 quantified the degree to which the categories and functions of the Assiniboine South implementation model were relevant to the

1982-85 Canadian Studies implementation in the Assiniboine South School Division.

TABLE 3

ASSINIBOINE SOUTH MODEL AND THE
CANADIAN STUDIES IMPLEMENTATION

Total Categories	Total Functions	Relevant Functions	%
3	24	21	87.5

It can be seen that 21 out of the 24 curriculum functions found in the three curriculum categories of the Assiniboine South implementation model were relevant to the 1982-85 Grade IX Canadian Studies implementation in the Assiniboine South School Division. Thus, the 87.5% degree of relevance of the Assiniboine model to the actual implementation was classified as 'high', and conversely the 12.5% degree of non-relevance for the categories and functions was classified as 'low' according to Appendix H.

ii. Leithwood Model to the Canadian Studies Implementation:

Table 4 quantified the degree to which the categories and functions of the Leithwood implementation model were relevant to the 1982-85 Canadian Studies implementation in the Assiniboine South School Division.

TABLE 4

LEITHWOOD MODEL AND THE CANADIAN STUDIES
IMPLEMENTATION

Total Categories	Total Functions	Relevant Functions	%
4	30	15	50

Table 4 shows that in the Leithwood model's four curriculum categories, 15 out of the total of 30 curriculum functions were relevant to the Grade IX Canadian Studies implementation in the Assiniboine South School Division. This 50% degree of relevance is classified as 'medium' according to Appendix H. Conversely, 15 out of the Leithwood model's 30 curriculum functions (50%) were non-relevant to the Canadian Studies implementation (a 'medium' degree of 'irrelevance' according to

Appendix H).

Combined, 36 of the 54 curriculum functions found in the Assiniboine South and Leithwood implementation models were found relevant to the Canadian Studies implementation. Thus, while 67% of the curriculum functions found in the seven categories of both models were relevant, 33% were not relevant to the Canadian Studies implementation. According to Appendix H, the overall degree of relevance was 'high', while the overall degree of non-relevance was 'low'.

2. What were the degrees of relevance of the specific categories of each implementation model as referenced to the 1983 Canadian Studies divisional implementation in Assiniboine South?

Table 5 identified the curriculum categories specific to the Assiniboine South and Leithwood implementation models and quantified their degrees of relevance to the Canadian Studies implementation.

TABLE 5

RELEVANCE OF THE CURRICULUM CATEGORIES IN THE
LEITHWOOD AND ASSINIBOINE SOUTH MODELS AS
REFERENCED TO THE CANADIAN STUDIES IMPLEMENTATION

Categories	Degree	% Relevance	Non- Relevance
1. Planning	Medium	50	50
2. Organizing	Medium	63	37
3. Supervising	Low	30	70
4. Communicating	Medium	67	33
Total:	Medium	53	47
5. Model Development	High	88	12
6. Staff Development and Participation	High	75	25
7. Administrative Support	High	100	0
Total:	High	88	12
Grand Total:	High	68	32

The curriculum categories of the Leithwood model found most to least relevant to the Canadian Studies implementation were: 'communicating' -

67% - 'high'; 'organizing' - 63% - 'medium'; 'planning' - 50% - 'medium'; and 'supervising' - 30% - 'low'. Thus, together the 'communicating' and 'organizing' functions accounted for most of the curriculum category relevance, and least of the non-relevance, to the program implementation. The four Leithwood model categories accounted for a 53% (medium) degree of relevance and 47% (medium) degree of non-relevance to the Canadian Studies implementation. In other words, almost half of the Leithwood model's curriculum functions had no relevance to the 'local' aspects of the implementation.

From highest to lowest, the curriculum categories of the Assiniboine South model most relevant to the Canadian Studies implementation were: 'administrative support' - 100% - 'high'; 'model development' - 88% - 'high'; and 'staff development and participation' - 75% - 'high'. The three categories of the Assiniboine South model accounted for a 88% (high) degree of relevance, and a 12% (low) degree of non-relevance to the Canadian Studies implementation. Thus, almost all of the curriculum categories and functions in this model were highly relevant to the needs and concerns of the local Canadian Studies implementation.

Taken together, all the categories specific to the two implementation models accounted for a 70% (high) degree of relevance, and a 30% (low) degree of non-relevance to the local characteristics of the Canadian Studies implementation.

3. Which were the categories and functions of both implementation models found sufficiently relevant to the Canadian Studies implementation to be included as part of a combined curriculum implementation model?

Table 5 revealed that three process-oriented categories, and two managerial-oriented categories were sufficiently relevant to the Canadian Studies implementation to be combined into a separate implementation model. The five categories from most to least relevance of both models were: 'administrative support'; 'model development'; 'staff development and participation'; 'communicating'; and 'organizing'. Together these categories accounted for 83% of the relevance (high) of all the categories and functions referenced to the Canadian Studies local implementation.

Those models of least relevance to the Canadian Studies implementation were 'planning' and 'supervising'. Together, they accounted for only 17% of the relevance to that implementation - 'planning' and 'supervising' each accounted for 8.5% of the relevance to the Canadian Studies model.

The inclusion of five out of the seven categories of both models accounted for 71% of the categories of both models sufficiently relevant to the Grade IX Canadian Studies implementation.

4. What were the degrees of administrative involvement in the Canadian Studies curriculum implementation according to the curriculum categories of the Leithwood and the Assiniboine South implementation models?

Synthesized from Appendix I, the data in Table 6 identified and quantified the administrative involvement as referenced to the curriculum categories and functions of both models.

TABLE 6

ADMINISTRATIVE INVOLVEMENT IN THE CANADIAN STUDIES
IMPLEMENTATION

Categories and Functions	%	Degree
1. Leithwood Model		
1. Planning	33	Low
2. Organizing	87.5	High
3. Supervising	30	Low
4. Communicating	83	High
Sub-Total:	57	Medium

2. Assiniboine South Model

1. Model Development	87.5	High
2. Staff Development and Participation	75	High
3. Administrative Support	87.5	High
Sub-Total:	83	High
Grand Total:	69	High

Administrators participated in 17 out of the 30 'managerial' (Leithwood) functions for a 57% (medium) involvement rate, and in 20 out of the 24 'process' (Assiniboine South) functions for an 83% (high) participation rate. Such a discrepancy in rates can be attributed to the fact that Assiniboine South administrators, while ultimately responsible for the implementation, exercised a collaborative and supportive role in the essentially cooperative implementation process in the Assiniboine South School Division from 1982-85. Combined, administrative involvement with functions common to the Leithwood and Assiniboine models amounted to 37 out of the total of 54 functions for a 69% (high) participation rate.

According to the specific categories critical to the implementation models, those most highly rated in administrative involvement were: model development - 87.5% (high); administrative support - 87.5% (high); organizing - 87.5% (high); staff development and participation - 75% (high); and communicating - 83% (high). Combined, these five

curriculum categories accounted for 86.5% of the total administrative involvement in the Canadian Studies implementation.

The two remaining curriculum categories receiving the least administrative involvement with the Canadian Studies implementation were: planning - 33% (low); and supervising - 30% (low). Overall, these two categories and functions received only 13.5% of the total administrative involvement in the Canadian Studies implementation. The lone low category different to both models, and having the least administrative involvement was 'supervising' - principally because the five evaluation functions in this category were not linked to administrative activity. Planning, meanwhile, was a category closely linked to the specific and unique rationale of each model, and thus had little relevance to a model with fundamentally different assumptions regarding change [and curriculum implementation].

The actual involvement of administrators in the 1982-85 implementation of the Canadian Studies program in the Assiniboine South School Division was predominantly collaborative, and supportive to the teachers and the system's involvement in the curriculum process.

B. Conclusions

The data derived from the class observations, i.e., of the classroom instruction as related to program goals, and of program artifacts used to support this instruction, served to show that the 1982-85 implementation of

the Grade IX Canadian Studies curriculum in the Assiniboine South School Division has shown itself to be successfully implemented. These observations were important to the study in that they verified that the Leithwood and Assiniboine South implementation models were being referenced to a 'bona-fide' implementation.

The Assiniboine South process model of implementation was attributed a much higher degree of relevance to the local characteristics of the Canadian Studies implementation than was the Leithwood managerial model of change. The Assiniboine South model was more comprehensive, and had a higher 'capacity to effect change' as compared to the Leithwood model. The critical reason for this difference in 'comprehensiveness', as seen by the researcher, was shown in the design of the Assiniboine South model which encouraged 'adaptation to' local needs and concerns. The Leithwood managerial model, on the other hand, resembled a centralized plan which, while it had legitimate expectations about the goals of educational change, underestimated the local implementation process necessary to their realization.

In this study, the nature rather than the frequency of the planning process seemed to have a major effect on the outcome of the Canadian Studies implementation. The Assiniboine South model encouraged planning that established lines of communication, set forth initial goals and objectives with the help of a representative group(s) of project participants; and maintained a continuing process of planning. Frequent and regular staff meetings, and in-services provided a forum for monitoring project achievements and problems, and provided collegial support. These

meetings and in-services broke down the traditional isolation of the classroom teacher at a time when cooperation and communication with others was in high demand.

This study has shown that the identification of curriculum categories and functions critical to successful implementation depended more on their relevance and adaptability to the needs, concerns and conditions of local educational environments than to centralized standards and behaviors. In this study, the categories and tasks associated with administrative support, model development, and staff development and participation were functionally related to the local needs, environment and interaction of its members in order to accomplish the implementation. The managerial categories and functions of the Leithwood model, i.e., planning, organizing, supervising, and communicating did not address themselves specifically, but rather generically, to the particular locale of the Canadian Studies implementation. Accordingly and at best, the managerial categories were found to have a 'low' to 'medium' relevance to the Canadian Studies implementation.

The subjective basis (rationale) of a model frames the activities designed to achieve the goals of that model. In the case of the Leithwood model, the managerial rationale of identifying and controlling variables in a specific environment to fulfill the desired objectives has resulted in an emphasis on planning, organizing, supervising and communicating tasks and activities. The Assiniboine South model's rationale that program awareness is a pre-condition for program adoption; and that local teachers needed more knowledge and practise in unit planning and its classroom application,

resulted in communicative groupings, and professional development activities addressing these particular local needs. Each model's rationale, in turn, reflected a particular perception of curriculum, and how it was to be implemented, i.e., as 'administratively-directed', or as 'administratively-assisted'.

This study has shown that while educational administrators are ultimately responsible for implementing a new curriculum in their school division, e.g., Canadian Studies, their expertise, and experience in working collaboratively, and supportively with teachers through the planned change process related very favorably to the success of this particular curriculum implementation. Such collaboration is consistent with the notion that curriculum often needs to be implemented at varying levels within an organization.

Neither of the implementational models investigated in this study had categories and functions relevant to evaluative procedures adaptable to a particular implementational locale. As a result, the effect of the implementational procedure is often left to naturalistic observation in determining its success. Particular implementational obstacles noted during the interviews, e.g., insufficient in-service education, facilitator training, implementation planning time, together with a lack of evaluations of the Canadian Studies implementation leads one to believe that there remained room for improvement in implementing the Canadian Studies program.

In this study, the data has shown that while we can know how an educational setting implements a divisional curriculum, often what happens later to a program at the 'site' level is unknown to most practitioners.

Knowledge of 'site-based' curriculum continuation could help reveal the relationship between the nature of implementation and continued curriculum development.

C. Implications

The implications of referencing the Leithwood and Assiniboine South implementation models to the local Canadian Studies implementation relate to facilitating the curriculum implementation process at the divisional and school levels.

The conclusions supported by this investigation provide those responsible for the implementation, i.e., teachers and administrators, with knowledge of and the nature of the critical factors pertinent to a local implementation. Knowledge of these critical factors could help implementors construct a procedural plan for expediting implementations. The value of the functions common to both models, e.g., organizational, communicational, staff development, lies in their potential for addressing and adopting to the needs and concerns of the local implementational environment.

It cannot be implied too lightly that, in order to match the local needs of a school division to the appropriate implementational model requires knowledge of the conditions, needs, and concerns of one's particular educational environment. Taking 'inventory' then, becomes the pre-

condition for developing an implementation model appropriate to the local setting.

The fact that the Canadian Studies implementation was a cooperative effort between teachers and administrators lends credence to a well-organized, participatory, and cooperative form of implementation. The participatory practises of cooperative planning, problem-solving, decision-making, open communication, and goal setting in the Canadian Studies implementation could possibly lead to more effective practises in curriculum implementation. The implication here is for educators to measure whether or not the difference between the presence and absence of these cooperative ventures in a curriculum implementation is significant.

A critical implication for forming the rationale of a model to be used in implementing curricula regards the manner in which that rationale was developed. 'Were the procedures used in the rationale's identification appropriate? Was the rationale an accurate reflection of the needs of the concerned school jurisdiction? Did others participate and confer with the process suggested by the chosen rationale?' The foregoing questions suggest that great care should be taken in the identification of a rationale for a curriculum model since that rationale will strongly influence the framework, activities, assumptions and success related to the curriculum implementation.

Once these questions are answered, and the decision has been made to adopt a curriculum and proceed with an implementation plan, the issue of 'ownership' arises. The characteristics of both, the managerial and the process, models in this study reveal that 'reasoned control' over the

implementation process is necessary. The need for such control strongly implies that responsibility for the entire implementation process must be assumed by a particular person capable of fulfilling the implementative responsibilities within a school division. Additionally, this implies that many practitioners should become meaningfully and responsibly involved so that they too can exert 'reasoned control' in the implementation process.

This study has shown that divisional curriculum implementation utilizes functions from classical management theory, e.g., organizing, communicating, in addition to those activities which enhance teachers' professional development, e.g., in-servicing and workshops related to curriculum implementation. The implication of this is that professional management and leadership training combine well to help meet the demands of divisional and school curriculum implementation.

The presence of obstacles, while a detractor from effective implementation, implies that school administrators and teachers need to reflect, and prepare for appropriate action in response to anticipated obstacles to change. This need also implies, as a prevention technique, *development within one's organization* in preparing and reacting successfully to implementational barriers. Such reflection and strategy development could possibly improve a school system's capacity to implement curricula. Nevertheless, the allocation of resources, the timing of the introduction of the change, and the expectations for change in implementation must be gauged to the capacity of the local jurisdiction to engage in the curriculum change process.

D. Recommendations

This study's suggested model which synthesized the implementational categories and functions of the Leithwood and Assiniboine South models having relevance to local implementation processes needs to be developed and tested in an actual on-going curriculum implementation. The data generated from this testing could then be used to compare the model's implementational effectiveness with that of the Leithwood model, and the Assiniboine South model. Essentially, this testing could serve *to extend* the basic findings of this thesis as referenced to the specific conditions of a particular locale.

Further research is needed in order to test the validity of examining an 'imported' model, i.e., one that is not particular to the philosophy, needs, and conditions of a particular educational environment in comparison to a more 'locally-sensitive' model. Particular questions beg to be answered: "Did the results derived from model comparison have practical application to a unique environment?" "Did the generality and universality of the theoretical model render that model weak in its 'applicative transfer' when applied to a particular implementational locale?" "Would it have been more practical to direct research along the path of finding model effectiveness in those particular locales that have developed their own models?"

School divisions and schools could benefit from reflection and development of their own 'capacity for change'. This involves a critical awareness of one's environment, and being able to devise an

implementational model effectively addressing the needs and characteristics of that environment. Devising such models of change might provide divisions with planning frameworks that effectively act as a bridge between *their* need for curriculum implementation and *their* classroom applications.

Stemming from the implied importance of management and leadership training to effective curriculum implementation, it is recommended that curriculum 'networks' between school divisions, universities, and other groups, e.g., Manitoba Education, and the Manitoba Teachers' Society, be coordinated to provide ongoing implementation support to professionals concerned with curriculum implementation. Such networks could encourage school divisions to routinize innovative practises on an on-going basis, e.g., through 'innovative grants' for instructional excellence, and thus help practitioners to view innovation as part of their regular professional activities. Practises of this nature could develop into much-needed projects for testing of the relationship between curriculum implementation, the nature of student learning, and beneficial instructional outcomes derived from implementation.

Finally, the presence of obstacles in the Canadian Studies implementation helped to underline the importance and need in evaluating the degree to which each of the identified obstacles affected the actual implementation, and the need to develop strategies designed to address the particular obstacles so that the implementation process can progress as smoothly and meaningfully as possible.

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APPENDICES

A - I



Faculty of Education
ETHICS APPROVAL FORM

To be completed by the applicant:

Title of study:

Congruence In Implementation Behaviors and the Leithwood Model

Name of Principal Investigator(s) (please print):

Ron Saranchuk

Name of Thesis/Dissertation Advisor or Course Instructor (if Principal Investigator is a student) (please print):

Dr. H. May

I/We, the undersigned, agree to abide by the University of Manitoba's ethical standards and guidelines for research involving human subjects, and agree to carry out the study named above as described on the Ethics Review Form.

Signature of Thesis/Dissertation
Advisor or Course Instructor
(if required)

Signature(s) of Principal Investigator(s)

To be completed by the Ethics Review Committee:

This is to certify that the Faculty of Education Ethics Review Committee has reviewed the above named study and has concluded that it conforms with the University of Manitoba's ethical standards and guidelines for research involving human subjects.

Name of Ethics Review
Committee Chairperson

Signature of Ethics
Committee Chairperson

Dec 7/90
Date

APPENDIX B

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LETTER OF CONSENT



Winnipeg, MB R.
January 14, 1991.
(Phone:

Dear Mr. Dvorak:

I am writing to request your help in collecting data that is needed in completing research for my M.Ed. thesis in Educational Administration at the University of Manitoba.

The purpose of my study is to investigate and identify the degree to which the actors involved in the implementation of the 1983 Manitoba Canadian Studies program displayed the implementation behaviors specified in Leithwood's (1982) management of curriculum model. I will need your permission to interview the assistant superintendent (in charge of divisional programming), five principals, and five teachers who were directly involved with the 1983 Canadian Studies implementation in your division. The length of each interview will be approximately one hour. I will also require your permission to observe the classrooms of the five identified Canadian Studies teachers (three classes for each). These observations are designed to link divisional implementation with classroom activities and resources, and will not serve to evaluate teachers' competencies.

This study employs no deceptions or perceived negative effects for any of the participants. All participants will be duly advised that their responses (along with the researcher's observations) will be held in the strictest of confidence; that, if so desired, participants may withdraw from the study without penalty; and that all participants have a right to make inquiries about this research by contacting Dr. H. May, Department of Educational Administration and Foundations, University of Manitoba (phone: 474-9030).

It is my sincere hope that this study will benefit administrators and teachers in facilitating the implementation process in our schools. With this in mind, I will provide you with a summary of my final report for your personal use and for sharing with your staff. I would be happy to provide additional information about any part of this study that might be of interest.

Enclosed are two copies of this letter. Under "Signature of Consent" on the original copy, please sign your name and mail that copy to me in the provided self-addressed envelop. The second copy is for your records.

Please accept my appreciation for the time you have already taken in considering my request.

Signature of Consent,

Yours truly,

~~Mr. S.~~ Dvorak

Ron Saranchuk

cc Mr. P. Krescy,
Assistant Superintendent of Schools

APPENDIX C

ASSINIBOINE SOUTH SCHOOL DIVISION POLICY RE.
CURRICULUM IMPLEMENTATION

1. The most important unit for change is the individual school - adoption of new or revised curriculum; curriculum implementation occurs only when changes take place in the classroom.
2. Before a school begins to implement a new curriculum, it must adopt that curriculum - adoption is the decision to accept/use the new curriculum, guides and materials, and instructional changes.
3. Curriculum is a planning process affected by instructional activities - instructional practises implied by the curriculum occur; students interact with the teacher and the curriculum in the classroom; and when these conditions exist, implementation is occurring.
4. During implementation, the new curriculum is interpreted and translated by the user - the curriculum is adapted to meet the needs/accommodate the skills, expectations and values of the user; and teachers modify the curriculum accordingly.

5. The teacher is not the only implementor. The school administrator is the single most important individual affecting implementation - he is responsible for eliminating barriers; for creating an atmosphere that is task oriented; for facilitating and directing implementation planning and decision-making; for supervising curriculum use and creating a sound organizational climate that is conducive to change; for identifying and directing an implementation system for successful implementation; for assuring that communication channels are open; for being involved in the planning before and during implementation; for being supportive, encouraging and appreciative; for being receptive to change for successful implementation; and for encouraging, and maintaining teacher's willingness to implement, as teacher morale is crucial to success.

APPENDIX D

ASSINIBOINE SOUTH PROFESSIONAL DEVELOPMENT MODEL

18 Elem. Thurs.,			School Contact Groups				
8 JH	Sept. 30,1982	T-Lib.	Cl Teachers		Res. Teachers		Presentations to
4 SH	(a.m.)		Elem./	JH/	SH		two groups of 32
20 Res.			Pr.-1	LA-1	LA-1		9-10:30 Grp A-LA
13 T-Lib. <u>Presenters:</u>			Int.-1	SS-1	SS-1		Grp B-SS
J.Bevis-L.A.	(13)		(18)	(8)	(4)	(20)	10:30-12 Grp A-SS
G.McEwen-S.S.							Grp B-LA
30 Substitutes (.5)							
\$900.00 - Divisional			PHILOSOPHY AND RATIONALE				

October 22 --- School Administrators to encourage staff to attend LA/SS S.A.G. programs.

18 Elem. Fri.			School Contact Groups				Session I
8 JH	Oct. 29,1982	T-Lib.	Cl. Teachers		Res. Teachers		9:00-Unit Planning/
4 SH	(a.m./p.m.)		Elem./	JH/	SH		Integration
20 Res.		(13)	(18)	(8)	(4)	(20)	10:30-Joint Pres.

13 T-Lib. Facilitators: (Gemmel/Froese)
 J.Gemmel Facilitators: Session II
 V.Froese Faculty Personnel, Consultants, 10:30-Application
 E.Lamb (Lib.) Pilot Teachers of Unit Planning
 J.Bevis 12:00-LA/SS
 30 Substitutes (1.0) Session III
 \$1800.00 Shared (\$900.00 Divisional; 1:15-Content/Process
 \$900.00 School) 2:00 (K.Osborne, J. Irvine)
Session IV
 UNIT PLANNING AND INTEGRATION 2:00-Application of
 Unit Planning 4:00 LA/SS

Note: Teachers will attend LA or SS

Sessions to be	School Contact Groups	Share in the continued
scheduled regularly	Other T-Lib. Teachers Res. School	development/implementation
on a weekly or	Teachers Teachers Admin.	of unit,
cycle basis	Implementation	i.e., <u>Structure of Units</u>
	IN-SCHOOL SHARING SESSION	Pre-assessment
	RE. UNIT IMPLEMENTATION	Record Keeping
		Resource
		Teaching Strategies
		Special Needs
		Post Assessment

18 Elem.	Tuesday,		School Contact Groups		Groups to examine
8 JH	Nov. 30,	T-Lib	Cl. Teachers	Res. Teachers	and share concerns
4 SH	1982 (a.m.)		Elem/JH/SH		re <u>Structure of the</u>
20 Res.		(13)	(18) (8) (4)	(20)	<u>Units</u>

13 T-Lib. Facilitators: UNIT IMPLEMENTATION SHARING SESSION

As needed.

30 Substitutes (.5)

\$900.00 Divisional

Tuesday,	A. <u>Philosophy</u>	B. <u>Unit Implementation</u>	C. <u>Individual</u>
Jan. 18,	<u>and Rationale Session</u>	<u>Session</u>	<u>School Program</u>

	Bevis/McEwen	With: School Contact	e.g., Math
P.M.	(For teachers who	Groups	Computer Sc.
Divisional	have yet to receive this	For: Teachers in	
In-service	presentation	various stages of implementation	
(Teachers to select Option A, B, or C)			

Feb.-Mar., 1983		Individual School Contact Groups	School Contact
Half-day/	T-Lib.	Cl. Teachers	Res. Teachers
Full-day		Elem/JH/SH	
Individual School In-service		UNIT PLANNING AND INTEGRATION	Group responsible for organizing this program.

Facilitators: School Contact Groups

Teacher Center

Committee Members

TEACHER CENTRE WORKSHOPS

Workshops, etc. beginning February, 1983	E.G.
Record Keeping and Reporting	M. C.
Evaluation	J. G.
Grouping Techniques	C. H.
Learning Styles	J. T.
Teaching Strategies	L. C.
Parent In-service	C. T.
Grade Meetings	B. L.
Inter-Grade Articulation	V. C.
Administration/Supervision	

APPENDIX E

INTERVIEW GUIDELINE FOR SCHOOL PRINCIPALS

The following questions follow closely the structure and content of the Leithwood (1982) model on the management of curriculum implementation. The questions are intended to collect information at the school level.

i. Planning

1.a.) Explain the process(es) used to identify the Canadian Studies curriculum goals (provincial, divisional and school).

b.) What particular curriculum goals were identified? Was there any discrepancy between those of the province/division and those of your school?

c.) In assessing the Canadian Studies goals for your school, what staff, board, and/or community priorities were taken into account?

d.) Did any of these priorities lead you to modify any of the provincial Canadian Studies goals? If so, in what way?

e.) Were any particular curriculum goals for the Canadian Studies program made a priority in your school? If yes/no, for what reasons?

2. Did you identify any social, economic and/or political trends relevant to your school's Canadian Studies goals, and to your implementation process?

3.a.) Were you able to predict the effects of any of the above trends on your school's curriculum goals and process?

b.) In what ways did you make these predictions?

c.) What particular effects did these trends have on your goals and processes?

4.a.) To what extent did the curriculum planning strategy used in your school allow for decision-making amongst levels and groups of participants?

b.) What was the criteria for selecting this particular level/nature of decision-making for the implementation's actors as part of your school's planning strategy?

5.a.) Did your planning strategy allow for alternative (yet internally consistent) conceptual frameworks in implementation?

b.) What were some actual alternative frameworks implemented in your school?

6.a.) Of all the conceptual frameworks considered for implementation, which was chosen as the optimum?

b.) What was the criteria for making this choice?

ii. Organizing

- 1.a.) What processes were used to diagnose your school's
 - i.) Goals for implementation; and
 - ii.) Obstacles to their achievement?
- b.) What particular goals and obstacles were diagnosed as relevant to your school?

2. What processes did your school involve in designing/applying strategies to overcome these obstacles to implementation?

3. What identified processes were used to evaluate whether obstacles were overcome, and goals achieved at your school?

4. What was the basis (methods used) for selecting the teachers of the Canadian Studies implementation? (identifying skillful implementors in your school)

5. What kinds of decision-making structures did your school engage in to facilitate teachers carrying out the implementation?

- 6.a.) How were your school's costs for implementing the Canadian Studies program estimated?
 - b.) What were the costs, and resources identified as necessary support for the Canadian Studies implementation at your school?
 - c.) How were the needed resources allocated in your school?

iii. Supervising

On a school basis, how was information collected/used regarding the:

1. Goals for implementation, i.e.,
 - a.) Continuing appropriateness of selected goals;
 - b.) Extent to which school is achieving the goals; and
 - c.) Modification of goals.

2. Strategies for implementation, i.e.,
 - a.) Effectiveness of implementation, and accuracy of identified obstacles to implementation at your school;
 - b.) Effectiveness of decision-making structures in promoting implementation at your school; and
 - c.) Modification of evaluation and decision-making structures at your school.

3. Personnel in implementation, i.e.,
 - a.) Effectiveness of school personnel;
 - b.) Needed teacher implementation training; and
 - c.) Provision of training and/or reallocation of school personnel.

iv. Communicating

1. How did your school design and transmit communications relative to:
 - a.) Its progress in implementation;
 - b.) Ongoing/emerging curriculum processes; and
 - c.) Ongoing/emerging decision-making structures.

2. What communications were in place at your school for collecting reactions to the ongoing implementation?

3. In what ways did any communication processes help refine your school's curriculum goals, implementation, and decision-making structures?

APPENDIX F

INTERVIEW GUIDELINE FOR SCHOOL TEACHERS

The following questions follow closely the structure and content of the Leithwood (1982) model on the management of curriculum implementation. These questions are intended to collect information at the classroom level.

i. Planning

1.a.) Explain the process(es) used to identify the Canadian Studies curriculum goals (provincial, divisional, school and classroom).

b.) What particular curriculum goals were identified for your classroom? Was there any discrepancy between those of the province/division/school and those of your classroom?

c.) In assessing the Canadian Studies goals for your classroom, what board, community, school and/or student priorities were taken into account?

d.) Did any of these priorities lead you to modify any of the provincial/divisional and/or school Canadian Studies goals? If so, in what way?

e.) Were any particular curriculum goals for the Canadian Studies program made a priority in your classroom? If yes/no, for what reasons?

2. Did you identify any social, economic and/or political trends relevant to your classroom's Canadian Studies goals, and to your implementation process?

3.a.) Were you able to predict the effects of any of the above trends on your classroom's curriculum goals and process?

b.) In what ways did you make these predictions?

c.) What particular effects did these trends have on your goals and processes?

4.a.) To what extent did the curriculum planning strategy used in your classroom allow for decision-making amongst levels and groups of participants?

b.) What was the criteria for selecting this particular level/nature of decision-making for your students as part of your school's planning strategy relevant to your classroom?

5.a.) Did your planning strategy allow for alternative (yet internally consistent) conceptual frameworks in implementation?

b.) What were some actual alternative frameworks implemented in your classroom?

6.a.) Of all the conceptual frameworks considered for implementation in your classroom, which was chosen as the optimum?

b.) What was the criterion for making this choice?

ii. Organizing

1.a.) What processes were used to diagnose your classroom's

i.) Goals for implementation; and

ii.) Obstacles to their achievement?

b.) What particular goals and obstacles were diagnosed as relevant to your classroom?

2. What processes did your classroom apply in designing/applying strategies to overcome these obstacles to implementation?

3. What identified processes were used to evaluate whether obstacles were overcome, and goals achieved in your classroom?

4. What was the basis (methods used) for selecting the students for the Canadian Studies implementation?

5. What kinds of decision-making structures did you have in your classroom to facilitate students participating in the implementation?

6.a.) How was your classroom's costs for implementing the Canadian Studies program estimated?

b.) What were the costs, and resources identified as necessary support for the Canadian Studies implementation in your classroom?

c.) How were the needed resources allocated in your classroom?

iii. **Supervising**

On a classroom basis, how was information collected and used regarding the:

1. Goals for implementation, i.e.,

a.) Continuing appropriateness of selected goals;

b.) Extent to which students are achieving the goals; and

c.) Modification of goals.

2. Strategies for implementation, i.e.,

a.) Effectiveness of implementation, and accuracy of identified obstacles to implementation in your classroom;

b.) Effectiveness of decision-making structures in promoting implementation at your classroom; and

c.) Modification of evaluation and decision-making structures in your classroom.

3. Students in implementation, i.e.,

a.) Effectiveness of student participation;

b.) Needed student implementation awareness; and

c.) Provision of awareness and/or placement of students.

iv. Communicating

1. How did your classroom design and transmit communications relative to:
 - a.) Its progress in implementation;
 - b.) Ongoing/emerging curriculum processes; and
 - c.) Ongoing/emerging decision-making structures.

2. What communications were in place in your classroom for collecting reactions to the ongoing implementation?

3. In what ways did any communication processes help refine your classroom's curriculum goals, implementation, and decision-making structures?

APPENDIX G

CLASSROOM OBSERVATION SCHEDULE

The classroom observations focused on the instructional practises, and classroom activities which, in turn, reflected the structure, goals, objectives, skills and nature of content and activities particular to the implemented Grade IX Canadian Studies program.

Observations of the program were based on the following concerns:

1. Did the lesson reflect any program goal(s) relevant to the unit and class being taught?

- 2.a.) Does the program specify learning objectives related to its goals? (e.g., knowledge, thinking/research, attitude and value, and social participation)
- b.) How does the program allow for student participation?

3. Does the program encourage/support any particular teaching techniques conducive to fulfilling its objectives?

4. Are techniques for the measurement of student development (as per program objectives) provided for by the program?

5. Does the program allow for the teacher to deliver the curriculum alone? With others? (Specify groups, numbers of people, roles)

6.a.) Were Canadian Studies resources utilized in/with the observed lesson? (Specify)

b.) Are other Canadian Studies resources available for teacher/student use? (Specify)

7.a.) Does the program relate itself in class to the outside community?

b.) Does the in-class program provide structured opportunities for student assignments in the community?

APPENDIX H

LEVELS OF CURRICULUM IMPLEMENTATION CATEGORIES AND
FUNCTIONS

Categories/Functions

% Similarity/Difference

Rating

0 - 33.3%

Low

33.4% - 67.67%

Medium

67.68% - 100%

High

APPENDIX I

ADMINISTRATIVE INVOLVEMENT IN THE
1983 CANADIAN STUDIES IMPLEMENTATION

Curriculum Categories	Involvement
-----------------------	-------------

i. Planning

- | | |
|--|---|
| 1. identify goals | - |
| 2. identify social/economic/political trends | - |
| 3. predict effect of trends | - |
| 4. design planning strategies | X |
| 5. design alternative framework | - |
| 6. apply operational criteria | X |

ii. Organizing

- | | |
|--|---|
| 1. identify tasks in implementing goals | X |
| 2. identify obstacles | X |
| 3. strategies to overcome obstacles | X |
| 4. evaluate to see if obstacles overcome | - |
| 5. identify staff with organizational skills | X |
| 6. organize decision-making | X |

- | | |
|----------------------------------|---|
| 7. estimate implementation costs | X |
| 8. allocate resources | X |

iii. Supervising:

Collect information related to:

- | | |
|---------------------------------------|---|
| 1. appropriateness of goals | - |
| 2. monitoring of goal implementation | X |
| 3. modify goals | - |
| 4. effectiveness of strategies | - |
| 5. accuracy in identifying obstacles | - |
| 6. effectiveness in decision-making | X |
| 7. modify decision-making/evaluations | - |
| 8. effectiveness of personnel | - |
| 9. provide for training needs | X |
| 10. reallocate personnel | - |

iv. Communicating

- | | |
|--|---|
| 1. progress toward goals | X |
| 2. emerging implementation processes | X |
| 3. emerging decision-making structures | X |
| 4. collect reactions to implementation | X |
| 5. refine goals | - |
| 6. refine implementation/decision-making | X |

v. Model Development

- | | |
|---|---|
| 1. 'implementation' defined | X |
| 2. activities organized into stages | X |
| 3. utilized time-lines | X |
| 4. incorporated classroom and instructional
instructional concerns | X |
| 5. initiate from central planning committee
of teachers and administrators | X |
| 6. analyzed implementational data
in devising model | X |
| 7. took comprehensive inventory of
own locale prior to model development | - |
| 8. model specific to needs of own locale | X |

vi. Staff Development and Participation

- | | |
|--|---|
| 1. comprehensive grouping of teachers | X |
| 2. facilitator-training sessions provided | X |
| 3. emphasis on awareness and
unit-planning sessions | X |
| 4. local materials development | - |
| 5. evaluation of in-services and
implementation processes | - |
| 6. allocation of staff responsibilities | X |
| 7. communication and staff development
prioritized as vehicles critical to progress | X |

8. opportunity to discuss and work out implementational concerns	X
vii. Administrative Support	
1. operational costs provided for	X
2. teacher release time provided	X
3. promoted and managed sharing of instructional planning units	X
4. teacher-center continuation of program-related in-services	-
5. utilization of external and local consultants and administrators	X
6. initiated organization of divisional implementational groups	X
7. allocated instructional resources	X
8. held frequent, and regular staff meetings on implementation	X

* The 'X' symbol denotes involvement, whereas the '-' symbol denotes non-involvement.