“LEARNING THE OTHER”: THE EVOLVING IDENTITY OF A MERGED SCHOOL

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Edna Lardizabal Hussey

Dissertation Committee:

Gay Garland Reed, Chairperson
Val Iwashita, Field Mentor
Hunter McEwan, Graduate Chair

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The story of the evolving identity of Mid-Pacific is a tribute to all of you.

— Edna L. Hussey
ABSTRACT

The consolidation and merger of schools has been occurring at an alarming rate across the U.S. Public and private schools are confronted with yearly budget shortfalls, reductions in student enrollment, threats of closure due to enrollment or poor academic performance, tuition increases in private schools to offset operational costs. For some schools, the only option to survive in the educational market is consolidation with another school.

The autoethnography looks at the merger of two Hawai‘i independent schools and the identity crisis encountered by both schools from 2004-2014, the impact and challenges of the merger on the school community, and the ways in which the school's identity is evolving.

Assuming a school's identity is shaped by many factors — its historical and cultural context, its sense of place, the community's values, and the individuals who comprise the community, the study analyzes two schools' unique experience of survival, merger, assimilation, adaptation, and transformation. The questions framing this study are: What happens when two schools merge? How is school identity affected?; In the merger of schools, how is school identity negotiated?; Of what consequence is institutional identity?

Through semi-structured interviews with participants representing school constituencies from the acquired and acquiring schools, data was analyzed for broad categories or themes based on their retrospective accounts. The autoethenographer, a key participant in the merger process
and ten-year period following the merger, also provides an insider’s perspective that lends credibility and authenticity to the autoethnography.

Among the key findings are the critical importance of the articulation of the school’s assumptions, beliefs, and values about learning and teaching in creating school culture; the impact of authentic leadership; an understanding that organizational change must be systemic, sustained over time, and supported through a commitment of school resources; a recognition of the importance of sustained professional development led by teachers across all grade levels; and the acknowledgement that the impact of the loss of school identity cannot be overestimated.
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CHAPTER 1
INTRODUCTION

Background

Given the current state of the economy across the nation and in Hawai‘i over the past two decades, an increasing number of public and private schools, particularly schools with student enrollments below 250, are confronted with yearly budget shortfalls, reductions in student enrollment, consolidation of grade levels for economic rather than educational reasons, threats of closure due to enrollment or poor academic performance, tuition increases to offset operational costs (in independent schools), and in some cases, consolidation with another school.

The history of schools in the U.S. that have encountered financial difficulties or have closed is actually startling. In 1939-1940, there were 247,127 public schools in the U.S., compared with 90,661 in 1997-1998 (Beck, n.d.). In Chicago alone during 2002-2012, over 100 public schools were closed due to chronic low-performance among students, had been “turned around” with new administration and staff (“renaissance” schools), or were consolidated (Vevea, Lutton, & Karp, 2013) in order to remain open. As recently as May 2013, Chicago’s Public Schools Board voted to shutter 50 public schools, citing dwindling financial resources and falling enrollments. The vote has caused strong controversy because the closures are disproportionately affecting minority students and being viewed as a poor solution to disemploying teachers who participated in a September strike to demand higher salaries (“Chicago School Closings,” 2013).
In a Pew Charitable Trusts’ study of six urban Philadelphia districts that closed twenty public schools over a decade, closures were due to increasing budget pressures, demographics, students’ poor academic performance, and the growth of charter schools that offered alternatives, lessening the demand for public school education. (“Closing Public Schools,” n.d.). According to the National Alliance for Public Charter Schools (NAPCS) data from 2005 to 2011, an average 170 charter schools closed due to a variety of reasons, such as low enrollment, financial concerns, and low academic performance.

The problem of school closures is not confined to the U.S. In the U.K., at least 30 tuition-driven schools closed in 2009, most of these small prep schools without long-term contingency plans or enough cash reserves to rescue themselves (Clark, 2009). Apparently, school closures in New Zealand — at least primary and intermediate schools — have been attributed to sweeping educational reform, the introduction of for-profit charter schools, and teacher performance for pay (Peters, 2013). Neighboring Australia is also seeing a high incidence of school closures due to an “ailing balance sheet” (Clark, 2009) and large-scale initiative to bring significant change to government schools. According to the Australian Bureau of Statistics, schools have decreased from 9,600 in 2000 to 9,468 in 2010, and of this number, some have amalgamated two campuses into one school.

In Hawai‘i, the wrath of the economic downturn has been taking its toll on several private and independent schools with relatively long histories of more than fifty years. In 2010, two well-known schools, a parochial elementary and a faith-based K-12 school, succumbed to the ills of declining enrollment, shrinking revenue, and increasing demand for financial assistance. In
2013, an independent school was forced to close its doors just at the end of its academic year for similar reasons. From the school’s website, this poignant letter from the Chairman of the Board of Trustees to parents announcing the school closure carries a daunting message likely repeated among many schools facing the same predicament:

Due to declining enrollment and increased financial pressures on families leading to greater need for tuition assistance, the School can no longer financially sustain itself nor continue to offer our students the very best in twenty first century education. As such, the Board of Trustees has decided that it is in everyone’s best interest that the School close while the Board explores a variety of future possibilities. (http://www.aop.net)

Another independent school, with an enrollment of 20 in 2010, reported in the local media as having steady growth, recently closed in May 2013 due to declining revenue suggesting that the tides can quickly turn for any school (Vorsino, 2010). The life cycle of independent schools over the past twenty years has been shortened; schools having graduated two generations of students are no longer in existence. Survival requires financial resources such as healthy endowments or expendable property that many schools do not have other than tuition. Even Hawai‘i public elementary schools have been threatened with school closure or forced consolidation due to small enrollments and projected annual financial savings to the Department of Education, despite the schools’ high-achieving performance, a benefit of smaller school size on student achievement
(“DOE to decide on Queen Liliuokalani School closure,” 2010). These school closures, consolidations, and mergers impact entire school communities — students, faculty and staff, alumni, parents, boards — community support, and the very raison d'être for each school, as articulated in its vision, mission, and uniqueness of program by providing a particular niche for the diverse needs of learners.

A dearth of research exists on the impact of school mergers on institutional identity. One study (Wallace, 1996) analyzes the transitional challenges of cultural leadership in three UK primary schools merging into one institution. Consequences of the merger were the development of subcultures and separate identities in the merged institution, the result of attempting to preserve the schools’ identities. Altopeidi and Lavie (2006) look at the results of two studies of how schools make sense of changes and the collaborative work that might impact the identities of the organization and teachers’ personal identities. Czarniawska’s work (1997) proposes a narrative framework for interpreting institutions’ organizational culture with school leaders as actors in stage performance cast in the role of creating an “illusion of controllability.” Personal and organizational identities become “subnarratives” inside the modern narrative. Nahavandi and Malekzadeh (1988) explain the nature of mergers and acquisitions in the corporate world and modes of acculturation dependent on the degree of congruence between the acquired entity and the acquiring entity. The impact on the school community is nothing short of devastating. To provide a closer analysis of what one school among many in this situation would have been encountering, consider the factors leading to the demise of one such school.
Statement of the Problem

As head of Epiphany School, Honolulu, Hawai‘i, from 1997 through 2004, I experienced similar financial and enrollment challenges. Like most small schools with enrollments under 250, Epiphany depended completely on revenue from tuition. Every full-paying student enrolled enabled coverage for employee salaries and benefits and tuition assistance to qualified families; addressing program costs; maintaining facilities and taking care of facility repairs, purchasing school and liability insurance, and a host of other line items in the budget. In addition, since Epiphany was a church school affiliated with the Episcopal Diocese of Honolulu, an annual rental fee was assessed by the church for facility usage. Another factor was rigorous competition among independent schools for students. The budget for public relations and advertising was constrained due to the costs for media advertising, so there was increasing reliance on the school’s website and “word of mouth,” a phenomenon of how the local community attains its best “insider” information. The strength of the independent school community in Hawai‘i is the diversity of choice. In the last twenty years of Epiphany School, the educational program had transformed from a traditional academic to a progressive, constructivist program with multiage classrooms, inquiry-based curriculum, and alternative assessments of student learning. Epiphany was clearly a choice for many parents looking for a different philosophical approach to educating young learners. However, a constantly fluctuating student enrollment between 150 to 175 over nearly ten years made it very challenging to plan a yearly budget, much less strategize for the future.
Epiphany School’s board of directors, as hard-working and dedicated as they were individually and collectively, were unable to bring in major donors to the school and to build the endowment. Seeking grants as a revenue source was not possible since foundations do not provide funding for operating expenses. A board-supported annual fundraiser (formal dinner and silent auction) created strong community support and goodwill internally; however, the proceeds contributed only 5-6% of the annual budget. The board considered the addition of a preschool to increase enrollment and revenues, so to this end, one of the board members and I inquired among the surrounding neighborhood property owners about the possibility of securing land purchases or leasing — but to no avail. Appeals to the governing board of the Church of the Epiphany (vestry) to reduce the rental fee were also declined. These pressures eventually led to the merger of Epiphany School and Mid-Pacific Institute, or more accurately, the acquisition of Epiphany.

While the economics and politics of a school merger could be detailed at length, the aspect that begs attention and is markedly absent from the research is basically the untold story of how two schools — Epiphany School and Mid-Pacific Institute — each with an impressive history, honored traditions, school culture, individuals who contributed to the schools’ growth and development, and unique identity — navigated the challenges of the merger and encountered crises around school identity, and how the identity of the newly merged school has been evolving. The study analyzes two schools’ unique experience of survival, merger, assimilation, adaptation, and transformation.
Research Questions

As indicated earlier in this chapter, public, private, independent, and charter schools in the U.S. and in other countries continue to be subjected to threats of closure, or have already closed. In Hawai‘i alone, several independent schools have already closed and public schools are being forced into consolidation as cost-saving measures, regardless of the impact on students, teachers, and families. Untold numbers of independent schools are suffering the impact of low student enrollment, such as staff reductions, fluctuating tuition, consolidation of grades) which, in the long run, affect instructional effectiveness.

This dissertation looks at the merger of two Hawai‘i independent schools and the identity crisis encountered by both schools, the impact and challenges of the merger on the school community, and the ways in which the school's identity is evolving. Assuming a school’s identity is shaped by many factors — its historical and cultural context, its sense of place, the community’s values, and the individuals who comprise the community — the study analyzes two schools’ unique experience of survival, merger, assimilation, adaptation, and transformation.

The study will benefit schools facing similar threats of closure or opportunities for survival. The story of two schools becoming one school community not only offers hope for continued growth beyond mere survival, but also recognizes the critical importance of school identity and the factors contributing to a school's transformation and the ultimate effect on those who matter the most — our students.
The questions framing this study are:

• What happens when two school cultures merge?
• How is school identity affected?
• In the merger of schools, how is school identity negotiated?
• Of what consequence is institutional identity?

**Structure of the Dissertation**

The dissertation study is composed of five chapters. Chapter 1 introduces the background and purpose of the study, a brief review of literature, a statement of the problem, and the research questions. Chapter 2 is a review of literature regarding the history of Mid-Pacific Institute and Epiphany School and the context for the merger. Chapter 3 describes the research methodology and the theoretical framework for data analysis. Chapter 4 is a narrative account of the ten-year period (2004-2014) of the study, including the merger itself, the transition period from 2005 to 2009, and the transformative years from 2009 to 2014. Chapter 5 is an analysis and discussion of findings through the lens of three organizational theories and concludes with the implications of the study. Chapter 6 addresses the conclusions of the study.
CHAPTER 2  
LITERATURE REVIEW  

History of Mid-Pacific Institute

Setting the stage for missionary influence

Many missionary-founded schools sprouted soon after the arrival of American missionaries in Hawai‘i in 1820, convincing the aliʻi of the necessity of education to promote a civilized, literate society. The children of Hawaiian chiefs, of missionaries, and of intermarriages between the haole newcomers and Hawaiians and other ethnic groups received a higher social status than the island commoner, which led to the establishment of private schools in Hawai‘i as early as the 1830s (Hormann & Kasdon, 1959, p. 403). But the missionaries also established common schools for the majority of commoners, first for adults, then for children. In 1839, King Kamehameha III approved a general law, which included a section on the “appropriate business of all the females law of these islands; to teach the children to read, cipher, and write, and other branches of learnings, to subject the children to good parental and school laws, to guide the children to right behavior, and place them in schools, that they may do better than their parents” (Hunt, 1969). In 1840, Kamehameha III established the first public school system in Hawai‘i (TKorenaga, 2010).

American missionary-developed schools dominated the education landscape in Hawai‘i until the accession of Kamehameha IV in 1854. Having traveled widely as the representative of
the Hawaiian nation with his wife, Queen Emma, he favored the pageantry and governance of the British royalty, including the Anglican religious influence in England. The Anglican Church, in the name of Kawaiahaʻo Church, was established in Hawaiʻi and was attended frequently by Hawaiian royalty. After the death of Kamehameha IV, a Board of Education was established with the King’s own father, who had no background or interest in supervising the development of public schools, appointed as Minister of Education. When the public school system languished without proper supervision, the Board of Education appointed Hawaiʻi’s first inspector general who was mostly critical of the Hawaiian Evangelical Association.

Kamehameha V continued to limit American influence and the notion of democracy by promoting a new constitution and reducing the number of voters in an attempt to promulgate control of the Hawaiian royalty. Since the American Board of Foreign Missions had decided to end their support of all Hawaiʻi churches as missions, they turned their missionary interests to establishing missions in the Pacific area in Micronesia, the Marianas, the Marshall Islands, and other Pacific islands. The work of American missions flourished beyond Hawaiʻi, largely due to the strong support of congregations of Hawaiian churches. Thus, the American Board decided that their missionary work in Hawaiʻi had come to an end since a thriving Christian population had been successfully established in Hawaiʻi, to the extent that the Hawaiian churches were now evangelizing elsewhere. The Hawaiian Evangelizing Association expanded to include native and foreign-born Congregational and Presbyterian clergy throughout Hawaiʻi and the Pacific area. To sustain the spiritual independence and feeling of religious zeal, more Hawaiians were needed for the ministry. Children born to Hawaiian and Pacific-area missionaries needed boarding facilities.
and Christian-based education; Hawaiian girls needed to be educated to manage Christian homes. For this reason, Kawaiahaʻo Seminary was founded in 1864 to educate Hawaiian girls; the school would later merge with Mills School for Chinese boys, founded in 1892. With the addition of the Okamura Boys’ home, a boarding house for young children attending schools in Honolulu, Mid-Pacific Institute was formed in 1908.

**Kawaiahaʻo Seminary**

Kawaiahaʻo Seminary for Hawaiian girls began as a family school for girls by the Rev. Dr. Luther Halsey Gulick in his home located on King Street, then developed into a boarding school “for the support of children of Hawaiian missionaries” in a renovated building that used to house the Mission Bindery, the Mission Memorial Building. Missionary Lydia Bingham, followed by her sister Elizabeth Bingham, grew school enrollment from a dozen to 50 students, then at its peak in 1889 to nearly 150. Although the seminary began as a school for Hawaiian girls, there was never an admission rule restricting enrollment to students of Hawaiian ethnicity. Enrollment included Hawaiian descendants as well as girls of all ethnic groups, with many from the Pacific area. Kawaiahaʻo Seminary became part of Mid-Pacific Institute in 1907.

According to this online source (Bonura & Day, 2010), the Kawaiahaʻo Seminary students were in training to become teachers to address the shortage of English-speaking teachers in the 1890s. Students were taught by young missionary women whose strict disciplinary methods, including corporal punishment for offenses such as insubordination, stealing food, dancing hula, or speaking Hawaiian, was fairly common even public schools. Kawaiahaʻo Seminary was considered “a model for its propriety of deportment and order. English, Grammar,
comprised the curriculum (Pratt, 1957, p. 12). The elementary children who were enrolled in the seminary were taught to read, write, and do mathematics, as well as received instruction in vocal and instrumental music, sewing, and “training in the household arts.” (Castle, 1923). From 1864 through 1880, the school was truly multi-age, with girls ranging in age from three to twenty.

Kawaiahaʻo Seminary experienced four significant changes during Elizabeth Bingham’s administration. When several graduates of the school became assistant teachers, the school began to be recognized as a teacher training facility rather than only “training in the household arts” — cooking, cleaning, and sewing. During this time, the school began to admit non-Hawaiian students, specifically the first Chinese student. Another development was the granting of government funds to support education. The fourth change was the creation of the first Board of Trustees to care for school finances and facility expansion.

From 1881 to 1908, Kawaiahaʻo Seminary enrollment continued to increase with the construction of new buildings to accommodate crowded dormitory conditions. The school’s academic program gained prestige when its students excelled in their public examinations held in Kawaiahaʻo Church — “The examination in Hawaiian geography, music, physiology . . . Bible recitations, kindergarten exercises and calisthenics were admirably carried out” (Pratt, 1957, p. 18) before audiences that included on one occasion Princess Likelike and other members of Hawaiian royalty, school benefactors such as Charles R. Bishop (husband of Bernice Pauahi Bishop, who provided Mid-Pacific’s first endowment gift), W.R. Castle, and other foreign dignitaries. Helen S. Norton, who succeeded Elizabeth Bingham, wrote of Kawaiahaʻo
Seminary’s strides: “This school maintains itself at the head of the institutions of its class on these Islands.” (Pratt, 1957, p. 17). The increasing list of Kawaiaha‘o Seminary supporters in the late 1800s now have descendants who formed foundations to continue philanthropic giving to the Hawai‘i community — Charles M. Cooke, J.B. Atherton, Mother Rice (widow of William Harrison Rice), Samuel and Mary Castle, and George Norton Wilcox, to name a few.

During the period 1894 to 1908, the curriculum consisted of Biblical study, “applied Christianity, in which the pupils shall be taught the present great needs of the world, the duty and art of loving their neighbors as themselves . . . . instruction in the art of caring for themselves by the skillful use of the scissors, needle, and sewing machine; of leaven and baking powder, of milk, sugar, and eggs,. of oven and gridiron, of soap and washboard, of flat iron and starch, of dishpan and towel, of broom and duster. They should be consistently taught the dignity of labor . . . . The laws of temperance and hygiene should be thoroughly taught, and the girls should be trained in the art of vocal church music” (Pratt, 1957, p. 22-23). Interestingly, academic subjects such as algebra, trigonometry, botany, geology, French and English literature were not recommended studies because “these would take too much time from Industrial work . . . It would seem that the demand for higher branches of study will be in a measure met by the Kamehameha School for Girls . . . “ (Pratt, 1957, p. 23), which was founded by Charles R. Bishop and Bernice Pauahi Bishop. Academic subjects were taught to the elementary-age children from kindergarten through eighth grade, while the older students engaged in the industrial areas. The emphasis on industrial work was purely economic. With the overthrow of the Hawaiian government, widespread dissension among Hawaiians, and the formation of a
provisional U.S. government, all government funding ended while the island economy was in severe flux. Kawaiahaʻo Seminary was forced to rely on any income from the dressmaking, cleaning, and cooking the students could manage, including the youngest students, as their services were made available to the community. Earnings averaged $600 a month.

In 1905, the Hawaiian Evangelical Association decided to move the Seminary to a different location due to the overcrowded dormitory conditions and deterioration of school buildings. Enrollment had climbed to over 100 mostly Hawaiian and part-Hawaiian students. Moreover, more Hawaiian girls with behavioral challenges were being sent to Kawaiahaʻo Seminary because of its reputation in reforming students, though the increasingly diverse population impacted program quality. While a move to a new site was being considered, another school was being considered to share the site in Mānoa — Mills Institute.

**Mills Institute**

Francis W. Damon, son of the Rev. Samuel Chenery Damon, began the Mills School for young Chinese boys in 1892 at his home on Chaplain Lane. Francis married the daughter of an American missionary in China and was asked by Hawaiian Evangelical Association to oversee mission work among the Chinese throughout Hawaiʻi. He learned how to speak Chinese fluently and made it is his primary occupation to advocate for the Chinese laborers in Hawaiʻi. According to his wife, Mary Damon, six Chinese boys from rural districts in Hawaiʻi, beseeched Damon to set up a home school, which later grew to an enrollment of fifteen boys, then seventy more for which accommodations were built on the Damon property. The boys received an education in the “fundamentals of Christianity which have to do with integrity in business relations, conscientious
service to your community, assuming your share of civic responsibility, genuine participation in social community work and boldly standing and fighting, if necessary, for the spirit and laws which are incorporated in the Constitution of the United States.” (“Christian Education,” 1923)

The school was named Mills Institute in honor of Damon’s mother, Julia Mills, and his uncle, Samuel D. Mills, who played a prominent role in establishing the American Board of Commissioners for Foreign Missions and sending the first American mission to Hawai‘i. Eventually several buildings were constructed, with funding from the same individuals who had provided generous resources to Kawaiaha‘o Seminary—Mother Rice, Mrs. S.N. Castle, A.S.Wilcox, Charles R. Bishop, and others — to admit nearly four hundred Chinese boys. What had been the original intent to provide a Christian home for young Chinese boys, elementary through high school ages, grew into a large school with a business focus infused with Christian values. Students’ daily schedule began with prayers in Chinese, then later in the day prayers in English, general high school and college-preparatory classes, military drill, and commercial courses from bookkeeping to business law. While Mills Institute for Chinese boys thrived, another school began in Honolulu for Japanese boys — Okamura Boys Home.

**Okamura Boys Home**

The Okamura Boys Home, its earliest beginnings in 1896, was located on South King Street near the old Civic Auditorium, run by Reverend Takeo Okamura, pastor of Makiki Christian Church, who took in young Japanese boys to provide them a Christian education. A missionary from Osaka, Japan, Reverend Okamura was asked by friends to take their children into his home, the numbers growing from four until his home could no longer accommodate
students. Although Okamura was himself untrained in educating young children, he must have impressed the community because the demand was so great that the Hawaiian Evangelical Board bought property across from the Okamura Home to eventually build a two-story dormitory to accommodate up to fifty students (Pratt, 1957, p. 35-36). When enrollment burgeoned to nearly 200 students, the school was moved to a larger site, with financial support from Mrs. J.B. Atherton, Mrs. S.N. Castle, and other prominent philanthropists who believed in the goals of providing a strong Christian education. Although this growing school was referred to as an educational institution, Okamura considered it more a “good Christian home” for many students who actually attended other schools.

Since Reverend Okamura and Francis Damon both did missionary work through education, they agreed in 1906 that the older Japanese students matriculate to Mills Institute. Japanese language study was added to the Mills curriculum. Although the reasons for the transfer are not recorded, I can only speculate that the basis for the decision was financial and educational, with Mills more successfully established and receiving continued generous funding from the same group of missionary philanthropists. Added to this community of Chinese and Japanese boys, also in 1906, was the Korean Methodist Mission.

**Korean Methodist Mission**

Damon reported that because many Koreans applied for admission to Mills in 1906, Damon added a “special Korean department” to Mills Institute (Pratt, 1957, p. 36). This meant that three “main high school courses,” the nature of which is not disclosed in Pratt’s account of Mid-Pacific Institute’s history, were offered in Japanese and Korean. Working in collaboration
with the Methodists, the Hawaiian Evangelical Board provided additional space adjacent to Mills Institute to accommodate the Korean contingency. The curricular program for the Korean students was strictly academic and college preparatory.

**The Birth of Mid-Pacific Institute**

Mills Institute now comprised Chinese, Japanese, and Korean students being offered a largely academic program with business courses available only to Chinese and Japanese students. With nearly 700 hundred young boys of mostly high school age and another 100 young Hawaiian and part-Hawaiian girls in Kawaiahaʻo Seminary in need of larger facilities, the Hawaiian Evangelical Association deemed it necessary to find not only a new location for Mills Institute and Kawaiahaʻo Seminary, but also a new name — Mid-Pacific Institute — indicating Damon’s vision for Mills: “The relations which the Institute must necessarily come to hold with the great peoples of the Orient are fascinating in prospect. . . . and the influence of Christian training received . . . . As the intercourse between East and West grows more complex, the possibilities of influence, which an adequately endowed institution ($250,000) of this character should exert, are seen to be very great. Nothing that Hawai‘i has today promises more for the future than this modest institution” (Pratt, 1957, p. 37).

When Mid-Pacific Institute was organized by F.W. Damon in 1905, the thought was to retain the names Mills School and Kawaiahaʻo Seminary. However, these names became unwieldy and unpractical. A new co-educational policy brought together boys and girls in the grammar grades and in the high school, which made the school names misleading. Moreover, use of the Mills and Kawaiahaʻo facilities became dormitory and shared classroom spaces, and
delineating both school entities became more impractical. Thus, both schools became known as Mid-Pacific Institute, consisting of Mid-Pacific High School and Mid-Pacific Grammar School (Farrington, 1923). The school buildings retained the names of the two merging entities —the boys’ building as Mills Building and the girls’ building as Kawaiahao Building. Mills School was renamed Mills Institute, which later became Mid-Pacific Institute in 1905.

The merger of essentially four schools was an historic event, unlike many private schools which eventually became public schools such as Hilo Boarding School, McKinley School, and Kohala Girls School. Mid-Pacific Institute came to life “full grown” (Hopwood, 1923, p. 76) with the merger of four schools, which had already been making valuable contributions to the education of Hawai‘i’s youth. The board of the Hawaiian Evangelical Association in 1905 appointed the first board of managers of Mid-Pacific Institute with the hope that Kawaiahao Seminary for Girls, Mills School, the Japanese Christian Boarding School called the Okamura Boys Home, and the Korean Methodist Mission School could be combined under one governing board and located in one area. A prime location consisting of thirty-eight acres was secured in Mānoa Valley in an area called Wailele because of the site’s accessibility to public transportation, a natural spring (Kawailele), and land suitable for agricultural purposes. The site was purchased with funds from the sale of property owned by several missions. Other private donors contributed more land so that the total land was over sixty acres. Land ownership was then transferred from the Hawaiian Evangelical Association to Mid-Pacific Institute. Mid-Pacific Institute was incorporated in 1908 and new buildings were constructed as separate dormitory
spaces for boys and girls. Generous donors included several Athertons, Castles, Dillinghams, Gulicks, and many others.

However, although four mission schools had been successfully brought together to be housed in strikingly beautiful new, expansive buildings, Kawaiahaʻo Seminary and Mills School continued to operate as two separate schools for several reasons. In 1911, Francis Damon idealistically envisioned Mid-Pacific Institute as a school where “the Orient and Occident” (Pratt, 1957, p. 44), specifically bringing students from Japan on scholarship to Mid-Pacific Institute to promote international understanding and peace education. However, this vision could never be realized with Kawaiahaʻo Seminary, which continued to enroll mostly girls of Hawaiian ancestry of whom expectations were primarily to learn homemaking skills to meet community needs. Several years later, Alexander H. Ford, a friend of Damon, proposed the idea of establishing Pan-Pacific Union with Mid-Pacific Institute, a college enrolled with young men from every Pacific area country who might study each other’s business methods and culture to build a foundation for inter-racial education, alliances, and the promotion of commerce (Pratt, 1957, p. 45). In 1925, Frank Atherton, one of the founders of the Institute of Pacific Relations, which had councils in countries bordering the Pacific, shared Damon’s dream. However, this well-intended proposal never came to fruition because it was intended for boys only and could never have included the girls of Kawaiahaʻo Seminary. Even David Crawford, president of the University of Hawaiʻi, wrote an unofficial letter speculating a mission and purpose for Mid-Pacific Institute. Crawford suggested a partnership with Mid-Pacific Institute whereby a university council of the Institute of Pacific Relations be housed on the Mid-Pacific Institute
The proposed Mid-Pacific Institute of International Relations, affiliated with the University of Hawai‘i, would conduct research on international race relations, offer facilities for classrooms, and operate an International House modeled on Rockefeller’s own International House. Mid-Pacific Institute in the late 1920s was searching for an identity. However, there were two very different goals for two very different schools, Mills Institute and Kawaiahaʻo Seminary, having very different curricula, policies, and ambitions, with no middle ground except for the fact that both offered Christian education.

For over ten years, Mid-Pacific Institute invested time, resources, and talent into developing a farm on its property, originally to supply Mills Institute and Kawaiahaʻo Seminary with dairy products, fruits, and vegetables, with the possibility of selling farm produce as a source of revenue. However, this scheme failed for a variety of reasons. The land had never been cultivated, and so it took several years to eliminate the underbrush and weeds and remove large boulders. The development from water-logged land to a farm required husbandry skills, but there were not enough employees to quickly eradicate problems. Instead, the school relied on students enrolled in an agriculture class to work the farm, which included a piggery and a dairy. Over the course of the years, a farm superintendent was hired who made inroads on the development of the farm. However, sanitary conditions in swampy pastures and the piggery were difficult to manage, and the young students had no interest in the grueling work of digging, fencing, weeding, road building, and all the duties of caring for livestock. Other employees were hire to teaching students about horticulture, but these employees eventually left Mid-Pacific Institute over time. Thus the idea of farming was abandoned, but not without grand effort.
From 1908 through 1919, Mid-Pacific Institute’s search for an identity and Damon’s attempts to implement a new vision and new direction for the school, though highly idealistic, did not influence any changes in Kawaiaha‘o Seminary, except for the addition of classes in Japanese, Chinese, and Korean. Enrollment from grades one through eight was uneven, ranging from 7 students in first grade to 27 in sixth grade. A Christian education, combined with teaching academic literacy, household, and vocational skills, and community service, constituted a Mid-Pacific Institute education. Girls in grammar school focused on practical training in “household arts” — cleaning of all varieties (and cleaning thoroughly!), doing laundry, ironing, cooking, serving food, and nursing — primarily to train young girls for the duties of motherhood. There was clearly a sense of pride and accomplishment in the writings of Mid-Pacific’s founders about training young girls: “The great satisfaction to us in the practical training in household arts is that the girls seem to so thoroughly enjoy it and are eager and anxious to learn and improve and make use of the knowledge they received while here in school” (Smith, 1923, p. 77).

While Kawaiaha‘o Seminary’s program continued and the ethnic composition of mostly Hawaiian and part-Hawaiian girls remained relatively unchanged, Mills School (Pratt, 1957, p. 78) continued to enroll young Asian boys, though about one-third were described by Arthur Merrill, acting principal in 1901, as a “floating student body” — “malcontents from other schools . . . many of whom were undesirable and soon requested to leave . . . others who soon wearied of the work they were expected to do” (Pratt, 1957, p.77). As a result, stricter admission policies were set, with Mills continuing to enroll boys as young as first grade. Students represented a wide range of religious denominations, from Protestants and Catholics to
Buddhists, Confucianists, Shintoists, Taoists, and those without any affiliation. Nonetheless, all boarding students were required to attend Sunday School and morning worship in their respective churches or temples, as well participate in chapel services. The educational program in 1912 consisted of four years of academic courses in the high school, or students could choose commercial training (a business track). Students followed a strict schedule, rising at 6:15am, followed by chores, breakfast at 7:30am with faculty, dorm inspections, class work from 8:00am to 1:00pm, work scholarships and athletics from 2:00 to 5:30pm, dinner at 6:00pm, followed by study hall for the older students until lights out at 9:30pm (Pratt, 1957, p. 80).

In 1914, with a soaring enrollment of over 200, Mills required all students to live in the dormitories. Demand for enrollment of primary-aged students increased to the extent that many of them were turned away. The administration strategized that enrolling students from fifth grade and higher would ensure more students remaining at Mills through the completion of high school. In 1915, student self-government was implemented as an alternative to a mostly punitive demerit system in order for an elected council of students to determine rules of conduct and consequences for misbehavior. Although the Asian students were somewhat smaller in stature than students in the athletic league, Mills managed a fairly successful cross-country team, which boosted school spirit. High school students were inducted into one of two literary societies, the Alpha Phi and the Damon Lyceum, offering many academic gatherings (Pratt, 1957, p. 84-87).

In 1916, Dr. Robert Day Williams was appointed the first president of Mid-Pacific Institute, and John F. Nelson became the next principal of Mills School. It was during Nelson’s on-and-off tenure (he was called to armed duty during World War I) that the first Kawaiahaʻo
graduate enrolled in Mills as a freshman and also became the first girl graduating from Mills in 1920. Interestingly, the diploma conferred still bore the name of Mills even though the entity Mid-Pacific Institute was legitimately recognized as an educational institution. It was also Nelson who convened the first joint faculty meeting of both Kawaiahaʻo Seminary and Mills School, during which time the histories of both schools were recounted. Beyond a Mid-Pacific prayer meeting, the teachers met as separate groups to plan the school year — a disappointing missed opportunity for broaching discussions for consolidation. However, considering the deeply entrenched histories of both schools and the need for some kind of strategic thinking to merge programs and philosophies, the attempt was likely a conciliatory demonstration of what a first-term school president might consider, or of what was yet to come for the fractured Mid-Pacific Institute, an institution “for the training of Christian workers along ministerial lines . . . . and a proposed amalgamation . . . to bring about an educational institution which will in every way be a fine example of church unity expressing itself through educational ideals . . . “ (Pratt, 1957, p. 48). When Dr. John L. Hopwood succeeded Williams as president of Mid-Pacific Institute in 1919, Mills Institute was sturdily at the helm of Nelson, as was Mabel B. Scudder of Kawaiahaʻo Seminary.

The disparity between Kawaiahaʻo Seminary and Mills School under the auspices of Mid-Pacific Institute was becoming more pronounced. MPI’s first president, Dr. R.D. Williams, wrote to the head of Kamehameha Schools: “The present arrangement is a very artificial one, Kawaiahaʻo Seminary and Mills School being so different in their educational ideals and in the problems which they present. . . .Mid-Pacific Institute as it now stands is not an organic whole.
The institutions are united only on the business end and not on their educational, social, or religious sides” (Pratt, 1957, p. 72). Mabel B. Scudder also shared similar sentiments: “No effort has ever been made to unify the grade work of Mills and Kawaihaʻo, and yet we are Mid-Pacific schools. Each school goes its own way, indifferent to what text books are being used in the other school or to the quality of work done” (Pratt, 1957, p. 74). She raised questions about increasing the matriculation of girls from Kawaihaʻo Seminary to Mills School and the educational program — “Do we want to encourage the growth of the high school department to the curtailing of the work from which Kawaihaʻo was founded?” (Pratt, 1957, p. 74-75)

Hopwood himself made similar observations about the disparity but also acknowledged the factors contributing to Mid-Pacific Institute as a name only: “It is most natural that this condition should exist, due partly to the previous existence of each school with its own customs, purposes, and history; partly to the differences in races, and emphasized by the differences in educational aims . . . “ (Pratt, 1957, p. 96). His analysis of the issues, along with Mabel Scudder, revealed that —

• intellectually capable Kawaihaʻo students should be encouraged to pursue a high school program as Mills students;

• young boys enrolled in Mills School matriculated into Mills High school, whereas the few girls matriculating from Kawaihaʻo Seminary were coming from a vastly different educational program into Mills;

• only one girl in Kawaihaʻo’s graduating eighth grade had been enrolled in Kawaihaʻo the full eight years, with most students entering Kawaihaʻo at the fourth or fifth grade.
both Kawaiahaʻo and Mills would continue to provide a Christian school for the purpose of developing Christian leaders. This central philosophical purpose was pervasive throughout the rest of Mid-Pacific’s history.

As a matter of enrollment and the consolidation of schools, grades one through three were eliminated from Kawaiahaʻo, and the older male students in Mills who had been enrolled in primary grades were re-classified into the earliest beginnings of an ESL class in the upper grades, eventually eliminating the primary grades from both schools.

Hopwood believed that a new educational program with a clearly defined objective would help to resolve the challenges of two different schools still clinging to their names, programs, and histories though living under the Mid-Pacific Institute roof. In order to better prepare the girls for further academic education and income-generating careers, Hopwood proposed a high-standards curriculum so that Kawaiahaʻo students would gain “practical insight” (Pratt, 1957, p.102) into the financial framework for developing a business of sewing, nursing, or cooking, or consider teaching. At the same time, he proposed that higher-level mathematics, science, and language classes already offered to Mills students not be offered to the girls. He asserted that Kawaiahaʻo’s grade-school curriculum would need to match the academic demands of Mills School. Hopwood also proposed that since “there are some girls who reach the limit of their mental growth even before they graduate from the grammar grades . . . . I think we should endeavor to take some girls of this kind and give them one or two years of special training in the kitchen, the hospital or sewing room. . . . “ (Pratt, 1957, p. 103). By 21st-century standards, Hopwood’s biased, sexist comments clearly denigrate young girls, revealing his lack
of knowledge about the human potential of both genders and the culturally-accepted view at the time limiting women’s rights.

According to Pratt’s historical account (1957), this new educational plan was not adopted in its entirety due to the decreasing enrollment of girls into Kawaiahaʻo and the increasing operational costs. Fewer students meant less income. In 1920-1921, teacher attrition was rampant, affecting continuity in the educational program. The two largest budget items — food (an essential part of a dormitory program) and teacher salaries — forced budget cuts. Mid-Pacific’s financial future was also affected by World War I, as was the future of every federal, state, and local entity. Prior to the war, the demand for the sugar industry in Hawaiʻi created significant financial upward surges with individuals receiving bonuses and stockholders extra dividends. With the turmoil of world war, the sugar industry made severe cutbacks. Mid-Pacific Institute’s endowment value of nearly $600,00, consisting of stocks and bonds, was deposited with Trent Trust. Philanthropist George N. Wilcox, who had consistently been an active supporter of and donor to Mid-Pacific, gave the school in 1915 stocks and shares in the sugar industry valued at over $355,000 with an annual income of $25,000 — the largest single gift received by the school at the time. $15,000 was applied to the school’s general operating budget and the rest was to be re-invested, the additional interest for the maintenance and repair of buildings on the Mānoa property. There were other sources of income for Mid-Pacific through the donation of shares from other Hawaiʻi philanthropists and community members. The point of this explanation about the school’s fluctuating finances is that Mid-Pacific survived the impact of World War I due to the generosity of certain benefactors. One strategy was to rally the alumni
who had become influential businessmen in Hawai‘i, who did manage to raise $15,000 in individual contributions. However, Mid-Pacific was soon to be threatened by enrollment decreases as a result of the progressive consolidation of Kawaiahaʻo and Mills.

In 1922, a new co-educational plan was implemented in the grammar grades. Boys and girls in grades five through eight attended Kawaiahaʻo with about the same number of students in the grammar school, 50 girls and 59 boys, in a more academically-demanding program. By contrast, there were 127 boys but only 46 girls in Mills (p.107 Pratt). The name Kawaiahaʻo Seminary was eventually discontinued because the term seminary referred only to all-girls’ schools or schools of theological instruction. Although Mid-Pacific Institute was the legal name, the girls and boys held steadfast to their respective school names, Kawaiahaʻo and Mills. In an effort towards diplomacy, the school’s Board of Managers eliminated both schools’ names and instead bestowed Mid-Pacific High School and Mid-Pacific Grammar School on the two grade-level divisions in June 1923. However, despite efforts to unify both schools with a single name, the schools were not any more close than they had been in 1864 (Kawaiahaʻo) and 1892 (Mills). The consolidation of identities, loyalties, and histories in 1923 was undeniably more challenging than the next school “merger,” which was to occur 81 years later with Epiphany School.

The next twenty years of Mid-Pacific’s history, as reconstructed by Pratt (1957) focused on increasing and stabilizing the enrollment and strengthening school finances. One of the issues of enrollment concerned the wide range of ages of students. Older students were placed into fifth grade, the lowest grade level in the school, based on English language proficiency. This arrangement was ineffective in supporting language learning and only increased the social and
academic issues of co-mingling older students with fifth graders. Another issue was the rising demand from parents to send their children who might have been characterized as “miscreants” to a school that might reform their children’s behavior. Boarding schools tended to have reputations as quasi-reform schools, so student conduct and discipline were often challenges to the faculty. Eventually, the grammar school enrollment decreased to the extent that grades five and six were eliminated.

Mid-Pacific’s financial condition posed a constant worry to Dr. Hopwood the entire time he was president, from admissions and the quality of students to facilities maintenance, teacher retention, and program quality. Mid-Pacific implemented various strategies to bring in additional income other than tuition, which increased a few times during this period. Cecil Martin, a highly skilled craftsman, was hired in 1919 to teach manual training to boys aged 11-14. After he had completed two years of teaching at Mid-Pacific Institute and was aware of the school’s financial situation, he proposed a shop program (mechanical and woodwork) as an income-producing resource. The shop program expanded quickly, requiring the construction of a separate building. Scholarship students produced high-quality items such as picture frames and lamp stands, and mill work such as doors, window frames, and moldings to fill commercial orders. According to Pratt (1957), residents and island visitors frequented the Mid-Pacific shop to purchase high-quality hand-carved pieces (p.110-112). A short-lived idea, which was not implemented, was to offer classes to teach potential new Japanese girl students domestic skills and how to become dutiful, docile housewives. When enrollment dropped even further due to tuition costs and the building of new public junior high and senior high schools in neighborhoods surrounding Mid-
Pacific diverted enrollment to these schools, part of the Atherton dormitory was rented to
University of Hawai‘i coeds for a year until the university had difficulty securing the number of
students for which space in Atherton had been reserved. Eventually, Mid-Pacific weathered the
impact of the Depression, to the extent that finances could be used to renovate Wilcox Hall
dormitory into small, private rooms under the direction of Martin and shop students. Even a
gymnasium was built. During Dr. Hopwood’s long-term presidency from 1919 to 1941, he was
able to oversee a challenging period of growth in all areas of the school program. He maintained
high standards of academic and practical education and held steadfast to his own beliefs about
providing the moral and ethical standards of the Christian faith and concepts such as self-
discipline and personal responsibility. Pratt (1957) writes that Hopwood “remained unaffected by
the rising tide of theories of education which stressed self-expression without emphasizing
sufficiently the inseparable correlative —increased personal responsibility and self-
discipline” (p. 122). To his credit, Hopwood was the first administrator to make the notion of
Mid-Pacific Institute a reality, as opposed to its functioning as two schools under the guise of a
name. Blending programs, student body, finances, and faculties required the stamina and
commitment of a school leader whose vision of Mid-Pacific Institute as a unified school
community composed of a diverse ethnic student population and students having diverse
strengths, learning in a strong academic and practical arts program based on Christian beliefs,
was realized.

The history of Mid-Pacific Institute is an intriguing story of merging schools for the
education of young persons and providing a diverse ethnic student body an academic education
rooted in Christian values. In 1923, Wallace Farrington, Governor of the Territory Hawai‘i, wrote in newspaper The Friend, “Mid-Pacific Institute, by surrounding its students with every Christian influence, is giving them the moral and religious foundations upon which can be built strong and useful careers. . . . No finer or better opportunity for preparation for life can be obtained than that which Mid-Pacific and similar Christian boarding schools of Hawai‘i are offering the young people” (p. 75).

The educational program was typical for the time, addressing the expectations missionary-steeped administrators thought necessary in “Christianizing” and transforming many ethnic groups from their “old manners and customs” to “the ideals of citizenship” (Farrington, 1923, p. 75). Foremost was attention to Christian education in the form of Bible study and lectures and readings on living a moral life guided by Christian values. There was missionary zeal for equal opportunity for all Hawai‘i’s youth from administrators and teachers of Mills Institute and Kawaiaha‘o Seminary to provide a “real education” – “not that which communicates knowledge or power, but that which quickens intellectual, moral, spiritual life; not that which arms the vigor of self-interest, but that which calls out to devotion to social duties; not that which concentrates our efforts on what we can gain for ourselves, but that which directs us to joys which grow greater as they are shared by more . . . “ (Westcott, 1923, p. 86).

In the earliest years of Mid-Pacific Institute, many of the young boys came from families of agricultural laborers who worked on sugar cane and pineapple plantations. There were administrative plans to train the young students to run a dairy farm on the school’s land since there was a demand for dairy products; however, the plan never materialized because of the lack
of skilled instructors and the fact that many of the students did not desire to continue in their parents’ agricultural work. Wood-working was considered to teach boys a trade that could be profitable. Interestingly, a more academic program was offered to boys first as they matriculated into high school.

Eventually, Mid-Pacific Institute developed an academic and vocational program for the high school, which both genders of students aspired to complete successfully in return for the promise of continuing into college. More than half the graduates of Mid-Pacific Institute in the 1920s attended the University of Hawai‘i.

The newly-minted Mid-Pacific Institute also advocated against the discrimination of the “yellow peril” — as Francis Damon had described Asians in The Friend — “to an honorable place in this practical translation into daily life of the gospel of good will to all men the Mid-Pacific Institute would seem to have a legitimate call and this alone would justify and establish its reason of being” (1923, p. 86). There had been widely prevailing sentiment in other newspaper editorials against the Cantonese immigrant laborer in the United States, with racial stereotyping of the Chinese and political antagonisms such that the Chinese did not have the characteristics of an American citizen.

While the financial and educational aspects of the Mid-Pacific merger are often the focal point of historical records, less has been said about the fact that whole communities of existing schools with distinct cultural groups from the original schools — Hawaiian, Chinese, Japanese, and Korean, as well as Filipinos and other Pacific Islanders— also merged. This aspect is what makes Mid-Pacific unique in its creation and rationale for its name appropriate. One can only
imagine the ethnic challenges among young persons who would have struggled developmentally
just with their identities as adolescent persons, and added to this their struggle with cultural
identity in the midst of an artificially-produced cultural marketplace called school, yet another
level of cultural complexity.

History of Epiphany School

Epiphany School began in 1937 as an educational mission of the Episcopal Church of the
Epiphany, unlike Mid-Pacific Institute’s beginnings in 1908 as the merger of two Christian
missionary-founded schools. Information about the history of Epiphany School was pieced
together from church bulletins, school communications, and conversations with church members
because there is no published history of the school. The church was an outreach mission of St.
Clement’s Parish to meet the needs of Kaimukī, a fast-growing suburb of Honolulu. In 1910,
property for the mission, a small private home on Tenth Avenue, was purchased by Bishop
Restarick, the first of the American Bishops of the Anglican Communion in the Hawaiian
Islands. The Epiphany Mission Hall, funded by a women’s guild in 1911, was to be used for
church services and Sunday School. In 1915, ground was broken on January 6, the Feast of the
Epiphany, to construct a church from lava rock that the congregation quarried piece by piece on
the site. Its design was an adaptation of an 18th-century English country chapel in the Gothic
tradition; the original church structure remains on the same site. Epiphany became the first
church in the Kaimukī area. The Reverend Frank Saylor, who was also principal of ‘Iolani
School, shepherded the completion of the Epiphany Mission into the Church of the Epiphany.
The school, under the direction of Georgiana Crutchfield, opened in 1937 with nine kindergarten students, then expanded in 1938 with first and second grades. Public kindergarten was not yet established in Hawai‘i, so the kindergarten enrollment easily expanded. The school grew incrementally, with third and fourth grades added in 1939 followed by fifth and sixth grades in 1945. Crutchfield resigned in 1941 for health reasons and was followed by Anita Brightman until 1951. By the 1950s, enrollment had grown to over one hundred students, most from the surrounding neighborhood. Although there are no written records describing the type of educational program, it would be reasonable to speculate that the children were provided some religious instruction in addition to a basic curriculum of reading, writing, and arithmetic.

Between 1915 and 1950, Epiphany Church had twelve rectors in fairly quick succession. In 1950, the Episcopal Diocese assigned the Reverend Burton Linscott to the Church of the Epiphany as its next rector. He left Christ Church in Kealakekua on the Big Island of Hawai‘i with his immediate family to assume his new role in the Episcopal community on O‘ahu. In the undocumented history of the Church of the Epiphany, Linscott is the most remembered because of his twenty-eight-year tenure as rector. According to his daughter, who provided most of the biographical information, Linscott was a very talented and hard-working individual, assuming dual responsibilities as church rector and school principal. His goal was to increase church membership and to prepare students for admission to two Episcopal intermediate/high schools (making Epiphany a “feeder” school). When he arrived at Epiphany, he found the school facilities in dire condition — holes in walls, a leaking roof, and termite-eaten floors. With permission from the church in 1953, Linscott took out a loan to build a parish hall, kitchen, and
four classrooms. In 1958, he signed another loan to construct a two-story building to house six more classrooms and school and church offices to accommodate the increasing enrollment. Through fundraising and with some of the construction done by Reverend Linscott himself, land was purchased to accommodate a school playground, custom-designed stained glass windows for the church were installed, and a new pipe organ and columbarium were added to church property. During his tenure, the church experienced increased attention to facility construction and expansion.

From 1955 to 1990, enrollment fluctuated between 150 and nearly 250 students. For example, enrollment was 229 students in 1969. In 1972, it was 174. It rose to 238 in 1976, dipped down to one hundred ninety-five in 1978, then increased to 240 in 1979. With no enrollment or demographic analysis available, it was difficult to ascertain the factors contributing to the fluctuations.

In 1981, the church vestry had actually considered reducing school enrollment in order to limit class size in the fifth and sixth grades so that students could be ensured a quality education. Other alternatives considered were to combine the fifth and sixth grades into one large class of thirty; to rent space off campus or construct a temporary building on campus to house the sixth grade; and even to schedule sixth-grade classes in various areas of the church and school (a “moveable” classroom). Parents were very concerned about the criteria by which students would be declined continued enrollment, and if so, where parents would be able to enroll their children. In the end, a building was rented off campus, a block away from the church/school site, to house
the kindergarten, thereby relieving the pressure for classroom space and accommodating all
grade levels.

In the late 1980s, several school parents approached the church Vestry, the governing
entity of an Episcopal church, for approval to allow the school to incorporate with a separate
governing structure to oversee all matters directly related to the school. At the time, the Vestry
consented for several reasons: 1) School enrollment, from which a percentage of tuition income
was derived for the church’s support fee, seemed robust. A board of directors composed of
school parents and other community members could help to manage fiscal affairs and strengthen
the school’s standing in the educational community; 2) Other Episcopal church-schools had
experienced success with similar governance structures; and 3) The rector and vestry would
continue to have legal and fiscal accountability, while the school board of directors would have
administrative and academic accountability. In 1990, the vestry approved the charter of Epiphany
School. The charter, amended in 1994 to comply with Hawai‘i state laws regarding non-profit
corporations, contained specific language regarding membership, powers and duties of the board,
actions and committees of the board, and other board responsibilities, such as handling
contributions and disbursements, selection of officers, and execution of contracts. Members of
the Board of Directors included the rector (ex-officio) and a vestry member.

Several years prior to the school incorporation, in 1984, a new head of school was
employed by the Vestry, and under her leadership Epiphany School’s education program shifted
dramatically from a traditional academic to a more progressive program using “whole language”
and constructivist approaches. The head of school made an important strategic decision by hiring
faculty who espoused approaches such as inquiry learning, “authentic” assessments, and portfolios of student learning. Interestingly, these innovative teachers worked beside teachers who had a more traditional mindset, but there seemed to be no effort to change the teaching and learning paradigm among the traditionalists. Perhaps the duality appeased parents who expected a traditional, academic program, while on the other hand it intrigued parents who were open to constructivist approaches.

While classroom space was an ongoing issue, the Board of Directors investigated options to expand the school footprint. Property adjoining the church site with five unoccupied houses scheduled for demolition was available for lease, to which the board of directors committed in a thirty-year lease agreement. In 1995, the school acquired the lease and salvaged the houses by renovating them into classroom spaces.

Epiphany School gained respect for its progressive program, innovative faculty, and quaint classroom-houses in pastel colors, which attracted interest from passers-by. In 1997, the head of school resigned. I accepted the invitation to serve as interim head of school for three months while the board of directors conducted a national search. I became the permanent head of school and also the last administrator of Epiphany School.

In 1999, the rector published an open letter to the congregation in a Sunday bulletin, explaining a projected school enrollment of one hundred forty-five students, the lowest enrollment since the early 1950s, a considerable decrease from 229 students in 1996. He wrote in a memo to parishioners that in addition to the fact that decreased income from tuition would “ultimately erode the school’s ability to compete in an increasingly competitive market, the
shortfall in revenue would directly impact the church by reducing proportionately the money the school pays the church.” This assessment fee, which would go directly into the church’s general operating fund, would decrease, thus imposing on church members the added responsibility of increasing their tithe to the church. As the rector had explained, “Our challenge as a congregation is to assure the immediate future of Epiphany Church . . . each of us needs to consider our role and the need to undertake a personal and collective ministry of stewardship to preserve our church, because it is important for our spiritual well-being and that of our posterity. . . .”

In an attempt to sever the school from the church so that the school might be able to explore options for survival and not be tethered to the church, the board of directors proposed that the vestry approve the school’s complete independence from the church. These extenuating circumstances led to the eventual merger of Epiphany School with Mid-Pacific Institute and the closure of the corporation of Epiphany School.
CHAPTER 3
METHODOLOGY

Qualitative Research Design

Considering the purposes and context of my study, I determined that a qualitative research design would best facilitate the study of issues in depth and detail. I was basically interested in understanding how various members of a school community made sense of the phenomenon of a merger and the developing experiences associated with the merger. A qualitative design allows for inductive analysis of the phenomenon in its natural setting and for the researcher to construct theories for understanding the phenomenon based on the multiple realities or interpretations of an event. As Patton (1985) explains,

[Qualitative research] is an effort to understand situations in their uniqueness as part of a particular context and the interactions there. This understanding is an end in itself, so that it is not attempting to predict what may happen in the future necessarily, but to understand the nature of that setting — what it means for participants to be in that setting, what their lives are like, what’s going on for them, what their meanings are . . . and in the analysis to be able to communicate that faithfully to others who are
interested in that setting . . . . The analysis strives for depth of understanding (p. 1).

Merriam (2009) explains other characteristics of qualitative research supporting the nature of qualitative inquiry. The researcher, as the primary instrument for data collection and analysis, can be immediately responsive and expand her understanding through nonverbal communication, clarify material, check interviewees for accuracy, and explore unanticipated responses. Rich description is used to convey the context; data is in the form of quotes from interview transcripts, researcher observations, documents, and field notes. Sample selection is usually purposeful and small (p. 13-18). In ethnography, the earliest distinct tradition of qualitative inquiry and also the primary method of anthropologists, the lens of culture is used to understand the phenomenon.

**Theoretical Perspective of Study: Autoethnography**

The theoretical perspective or qualitative tradition that informs my qualitative study is ethnography. The central assumption of ethnographic inquiry is that a group’s interactions over a period of time will evolve a culture, that is, “the collection of behavior patterns and beliefs that constitute the standards for deciding what is . . . for what can be . . . for deciding how one feels about it . . . for deciding what to do about it . . . and for deciding how to go about doing it” (Goodenough, 1971, p. 21-22). Although anthropologists have traditionally studied cultures in remote or primitive settings, modern anthropologists have applied ethnographic methods to study contemporary settings and social problems. Since the 1980s, understanding organizational culture and efforts to change an organization’s culture have become more evident (Schein, 1985,
2010; Evans, 1996; Deal and Peterson, 2009), to the extent that improving a program may also include changing the program’s culture. The ethnographer is immersed in the site as participant observer, providing the etic, or outsider’s perspective. Central to ethnography is “thick description,” a term often associated with Geertz (1973). However, the ethnography goes beyond description. The qualitative researcher analyzes and organizes findings on culture into concepts or themes derived from the data to explain the sociocultural patterns of the phenomenon under study.

On a qualitative continuum, ethnography would be viewed as the earliest qualitative tradition compared to autoethnography as an emergent 21st-century approach. While ethnography attempts to be true to the group or culture under study by capturing the etic or outsider’s perspective, autoethnography addresses postmodern critiques and deconstruction of classical ethnographies by “raising fundamental questions about how the values and cultural background of the observer affect what is observed while also raising doubts about the desirability, the possibility of detachment” (Patton, 2002, p. 84). How does an ethnographer study her own culture, such as a school, and provide an emic perspective insider’s perspective and an etic perspective — as both observer and observed? Ellis and Bochner (2000) define autoethnography in this way:

. . . an autobiographical genre of writing and research that displays multiple layers of consciousness, connecting the personal to the cultural. Back and forth autoethnographers gaze, first through an ethnographic wide-angle lens, focusing outward on social and
cultural aspects of their experience; then, they look inward, exposing a vulnerable self . . . As they zoom backward and forward, inward and outward, distinctions between the personal and cultural become blurred. Usually written in first person, autoethnographic texts appear in a variety of forms — short stories . . . personal essays, journals . . . In these texts, concrete action, dialogue, emotion . . . and self-consciousness are featured, appearing as relational and institutional stories affected by history, social structure, and culture, which themselves are dialectically revealed through action, feeling, thought, and language (p.739).

What distinguishes autoethnography from ethnography is the researcher’s self-awareness about reporting her own experiences and introspections as a primary data source. While the ethnographic aspect is based on careful research, the creative element is primarily in the writing, which becomes its own “method of inquiry, a way of finding out about yourself and your topic” (Richardson, 2009, p. 923). The challenge in an autoethnography is “finding and owning one’s voice . . . . Autoethnography increases the importance of voice and raises the stakes because an authentic voice enhances the authenticity of the work (Patton, 2002, p. 88). The tone of voice may be expressive, reflective, academic, or critical, “an expression of a reality” (Richardson, 2000, p. 937). From a non-traditional qualitative theoretical perspective,
the autoethnography provides a process and product for post-modern ethnographers like myself to voice and document my own experiences in the context of an evolving organizational culture.

**Data Sources**

Before data collection and as required by the University of Hawai‘i, I submitted the application for exempt status for human subjects research, completed the basic course on research on human subjects with the Collaborative Institutional Training Institute, and received approval of my study as exempt from federal regulations pertaining to the protection of human research participants.

As an autoethnography, the primary source of data was my own personal pre-merger and post-merger experiences. I used my own experiences to garner insights about my role in the school, the decisions and actions undertaken in my role, and my relationships with school constituents. During the two-year period leading to the merger and then the merger itself, I kept a notebook of meetings, observations, printed emails, and my thinking and questions, as well as a binder filled with artifacts related to the merger, such as memorandums, business and legal documents.

Another primary data source was the interview as an inquiry method, allowing me to enter into other persons‘ perspectives of the merger, how the merger was experienced, and how the merger impacted their experience in their respective roles in relation to the school. Patton (2002) explains, “Qualitative interviewing begins with the assumption that the perspective of others is meaningful, knowable, and able to be made explicit” (p. 341). The multiple perspectives
of interviewees added rich layers of meaning that provided depth and added complexity to the phenomenon of the merger.

The purpose of triangulation in my study was “to capture and report multiple perspectives rather than seek a singular truth” (Patton, 2002, p. 546). Lincoln and Guba (1986) (as cited in Patton, 2002) proposed that a constructivist or naturalistic inquiry should use criteria for distinguishing quality in qualitative research that is different from criteria in traditional social science. The term “credibility” is suggested “as an analog to internal validity, transferability as an analog to external validity, dependability as an analog to reliability, and confirmability as an analog to objectivity” (p. 76-77). In addition, Lincoln and Guba emphasized “authenticity,” the reflexive consciousness about one’s perspective and an appreciation for other’s perspectives (as cited in Patton, 2002, 2002, p. 546) and the notion of “trustworthiness,” that is, being balanced, fair, and conscientious in taking account of multiple perspectives (as cited in Patton, p. 2002, p. 575). In the context of data collection and the social constructivist framework of my inquiry, I wanted to understand the relationship of my own authentic experience and the authentic experiences of others with regard to the phenomenon of the merger.

**Data Collection Process**

The approach to collecting interview data was through a semi-structured interview consisting of a variety of questions (Appendix A) in broad categories (Patton, 2002, 350-351): questions asking about interviewees’ opinions and judgments in order to understand their cognitive and interpretive processes, for example, ‘What do you think caused or led to these challenges?’, ‘What metaphor do you think best describes the school’s identity today?’; questions
about the respondent’s background to help locate the respondent in relation to other people, such as, ‘Since 2003, what has been your role in relationship to the school?’); questions framed in a time dimension, for example, ‘In the first two to three years of the onset of the elementary school, were there any challenges?’). In a semi-structured format, I was able to keep the interview conversational, not having to phrase the questions in the exact wording or to ask questions in a specific sequence. I could also be more responsive to the interviewee by asking follow-up questions to further explore new ideas with the respondent.

I mailed thirty-three invitations to individuals who had experienced the school merger as faculty, staff, parent, student, administrator, or trustee. Respondents were selected based on their familiarity with the merger and developments from 2004 to 2014. Twenty-nine individuals volunteered to participate in the study. In the following table, interviewees are listed by their role in the school and the individual’s experience during particular phases of the ten-year period. ‘Acquisition’ refers to years 2002-2004; ‘Transition’ as 2005-2009; ‘Transformation’ as 2009-2014. School roles are described as ‘faculty,’ ‘staff,’ ‘trustee,’ ‘parent,’ ‘administrator,’ and ‘alumnus’ in order to protect the individual’s identity. Note that only one alumnus responded to the interview request, due to undeliverable mail or no response, although four had been invited. Some interviewees had dual roles, such as faculty/parent).
Table 1. Selection of Interviewees

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<thead>
<tr>
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<th>Relationship to school</th>
<th>Phase: Acquisition</th>
<th>Phase: Transition</th>
<th>Phase: Transformation</th>
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<tbody>
<tr>
<td>1</td>
<td>Staff</td>
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<td>Staff</td>
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<td>3</td>
<td>Faculty</td>
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<tr>
<td>4</td>
<td>Faculty</td>
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<td>5</td>
<td>Trustee</td>
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<td>6</td>
<td>Trustee</td>
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<tr>
<td>7</td>
<td>Administrator</td>
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<td>Parent</td>
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<td>Parent</td>
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<td>Faculty</td>
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<td>Parent</td>
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<td>Relationship to school</td>
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<td>16</td>
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<td>Parent/Faculty</td>
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<td>Faculty</td>
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<td>Staff</td>
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<td>Staff</td>
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<td>Trustee</td>
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<tr>
<td>24</td>
<td>Staff/Alumnus</td>
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<td>25</td>
<td>Administrator</td>
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<tr>
<td>26</td>
<td>Trustee</td>
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<td>27</td>
<td>Trustee</td>
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<td>28</td>
<td>Trustee</td>
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<tr>
<td>29</td>
<td>Staff</td>
<td>●</td>
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</table>
I also included a copy of the consent form (Appendix B) so participants were well aware of the topic and purpose of the study, duration of interview, and interview questions. I explained that the interview would be digitally recorded, then transcribed for further analysis, and that the recordings would be destroyed after the study. During the interview, I verified their affiliation with the school. Any personal information that could identify the participants has not been provided in the dissertation in order to ensure confidentiality and anonymity, and I assured them that I would store the transcripts in a secure location. In addition, I explained that only I would have access to the data, although legally authorized agencies, including the University of Hawai‘i Human Studies Program, would have the right to review research records. I explained that the benefits of their participation would be their opportunity to reflect on the merger and to voice their opinion and insights about the merger and the developments following the merger over a ten-year period. Moreover, I hoped that the results of the project could impact the school community in providing an explanation of Mid-Pacific’s evolving identity among other independent schools in Hawai‘i and across the nation, as well as provide a study for schools facing similar challenges of identity, closure, or program development.

Participants either mailed back their signed consent forms or brought their signed forms to the interview. I offered to meet interviewees at a location convenient to them; however, since most were already working on campus, we met primarily either at the elementary school in my office or a nearby conference room. I met four participants at their respective workplaces to conduct the interview; one interview was conducted via a recorded telephone conversation. Though most interviews were thirty to sixty minutes in duration, four interviews were nearly two
hours in length. I chose not to take notes during the interview so that I could focus on the conversation. Instead, I wrote memos and recorded key ideas, impressions, questions, and observations after the interview. I asked respondents at the end of the interview if they had anything else they wanted to contribute to the interview and thanked them for their time and opinions. Several participants expressed gratitude for having the opportunity to speak about the merger, as they had never been directly asked how the merger impacted them personally and professionally.

**Role of the Researcher**

In my dual role as observer and observed in this autoethnographic study, I was well aware of issues of positionality and credibility as the researcher “because the researcher is the instrument” in qualitative inquiry (Patton, 2002, p.14). Positionality in an autoethnography is central to the trustworthiness and credibility of the study, as it is the lens through which the researcher interprets, draws inferences, theorizes, and makes meaning of a phenomenon. I was aware of the biases that contributed to the credibility of my study as the researcher, main character, and narrator. I was fully involved in the events leading to the merger, from the beginning of my tenure in 1997 as head of Epiphany School and all developments that transpired as a result of the merger. I participated in Epiphany board of directors’ meetings and understood the financial challenges and governance issues with the Church of the Epiphany vestry. During the transition period from Epiphany to Mid-Pacific Institute, I was responsible for re-establishing the educational program, working directly with my faculty, the Mid-Pacific board of trustees, and the school president. The fact that I had over twelve years of involvement with Epiphany and
Mid-Pacific Institute combined enabled me collect rich data over a long period of time. My insider knowledge of the anatomy of a merger, having to strategize the decision-making and actions related to aspects of the merger, transition, and acculturation of the elementary school, lend credibility and authenticity to the autoethnography.

An additional area for bias comes from my knowledge of and relationship with the interviewees. I was in a unique position of knowing all of the interviewees in their roles as faculty, staff, administrators, trustees, parents, and alumni, on a personal and professional level and either as a head of school or school principal. Their familiarity with me contributed to a relaxed, conversational interview. Cognizant of my possible influence on the individuals, generally known as “reactivity,” I avoided any leading questions and was aware of any non-verbal communication that might sway or leverage their responses. None of the interviewees expressed any perceived discomfort, tension, or anxiety, and, in fact, were grateful to have voiced their opinions about the merger and their perspectives on how the merger had been developing over a ten-year period.

**Data Analysis**

Patton describes the theoretical framework for data analysis in this autoethnography as one of “voice, perspective, and reflexivity” (2002, p. 494-495).

The qualitative analyst owns and is reflective about her or his own voice and perspective; a credible voice conveys authenticity and trustworthiness; complete objectivity being impossible and pure subjectivity undermining credibility, the researcher’s focus
becomes balance — understanding and depicting the world authentically in all its complexity while being self-analytical, politically aware, and reflexive in consciousness (p. 494-495).

This process of triangulated reflexive inquiry provided a framework consisting of three sets of questions guiding the analysis of my data:

• Self-reflexivity: What do I know? What has shaped my perspective? How have my perceptions and my background affected the data I have collected and my analysis of those data? What do I do with what I have found?

• Reflexivity about those studied: How do those studied know what they know? What shapes and has shaped their worldview? How do they perceive me, the inquirer?


These reflexive questions applied not only to the intentionality of my voice as the autoethnographer but also to the intentionality and consciousness of the voices on interviewees represented in the study.

**Coding of Interview Data**

All digital recordings of interviews were outsourced for transcribing and emailed back to me. Transcriptions included time indicators so that I could locate specific quotes in the recordings. After reading through transcripts, I returned to the audio recording to verify a phrase
or sentence that did not make sense in the transcript; I also corrected spellings of names mentioned in recordings. Using Evernote to organize notes, I wrote an analytic memo for each transcript and began to note key ideas or questions and first impressions of the interview (Appendices C and D).

Before selecting a coding process, I considered from Emerson’s (2011) recommended list of questions a few that I felt were directly relevant to my study:

- How do members talk about, characterize, and understand what is going on?
- What assumptions are they making?
- What do I see going on here?

Saldana adds — What strikes you? — (2013, p. 22), and Sunstein and Chiseri-Strater (2007) expand on this:

- What surprised me? (to track my assumptions)
- What intrigued me? (to track my positionality)
- What disturbed me? (to track any tensions within my value, attitude, and belief systems) (p. 106)

Coding was applied to all transcripts as a prompt or trigger for deeper reflection and as a way to condense data for retrieval of the most meaningful material (Miles, Huberman, and Saldana, 2014, p. 73). I decided from the beginning of my data analysis that one level of coding would be sufficient in my autoethnographic study because I would be relying on interpretations of themes in and meanings of interview text. After reviewing a number of coding methods in Saldana’s coding manual (2013), I selected a mixed-methods analysis using In Vivo Coding and
Holistic Coding. In Vivo Coding is also known as “literal coding,” “verbatim coding,” and “emic coding.” The root meaning of “in vivo” is “in that which is alive” and as a code refers to a word or short phrase from the actual language used by the interviewee (Saldana, 2013, p.91). Holistic coding is used when the researcher already has a general idea of what to investigate in the data or “to chunk” the text into broad areas (Saldana, 2013, p. 142). A code was applied when something in the data appeared relevant to my research questions, struck me as particularly insightful, or provided a different idea. Through an inductive content analysis of the transcripts, I looked for patterns of different experiences, feelings, and attitudes during and after the merger. For example, Epiphany constituencies expressed fear, angst, and anxiety about unknown processes prior to the merger, while some Mid-Pacific faculty and staff described anxiety about perceived differences in educational values and beliefs. I further consolidated codes into eight broad categories based on my research questions: what happens when two school cultures merge? How is school identity affected? In the merging of two schools, how is school identity negotiated? Of what consequence is institutional identity? The categories, separated into perspectives from Epiphany interviewees and Mid-Pacific interviewees, became a deductive process of interpreting the data into the following broad areas:

• Benefits of merger from Epiphany view and from the Mid-Pacific view

• Factors or issues considered for merger decision from Epiphany and Mid-Pacific perspectives

• Merger process from Epiphany and Mid-Pacific perspectives

• Transition challenges from Epiphany and Mid-Pacific perspectives

• Transition solutions from Epiphany and Mid-Pacific perspectives
• Mid-Pacific identity before merger from Epiphany perspective and from Mid-Pacific perspective
• Current Mid-Pacific internal identity from Epiphany perspective
• Factors affecting Mid-Pacific identity from Mid-Pacific perspective
• Metaphor for Mid-Pacific identity from Epiphany perspective and Mid-Pacific perspective

This phase of analysis indicated some convergence or overlapping in coding, suggesting that the experience of the merger impacted Epiphany and Mid-Pacific in terms of their transition from being the acquiring school and the acquired school into a merged school and the evolving identity transformation of Mid-Pacific Institute. During the writing of the autoethnography, these broad categories with specific examples from transcripts were immensely helpful when I wrote the narrative of the merger phases (acquisition, transition, and transformation).
CHAPTER 4
RESEARCH FINDINGS

Setting the Stage for the Merger

*Epiphany School: “Growing apart”*

Serendipity. To describe the merger between Mid-Pacific Institute and Epiphany as a “fortuitous happenstance” or “a pleasant surprise” is a far cry from the wrenching, agonizing, belabored process the merger actually entailed. However, ten years hence, it can be said to be serendipity. Thus, a short tale of two schools, one in the worst of times, and the other looking ahead with caution to a potentially dismal future.

Epiphany School, once a vibrant “feeder” school to reputable independent schools in Hawai’i from 1950s to 1980s, began to experience a gradual, though steady decline in enrollment, from nearly 250 students enrolled in kindergarten through sixth-grade classrooms to a dwindling enrollment of about 150 during the mid-1990s to 2000. The decreasing enrollment was attributed to a number of factors: changes in demographics and birth rates; a surrounding neighborhood spanning several blocks with fewer and fewer school-aged children; the growth of other private elementary schools in the area and the increasing competition for students; an aging school facility; insufficient funds to market the school; and the transition from a “traditional” educational program to a more “progressive” program.
Like most private schools dependent on tuition income, the decreasing enrollment posed a significant threat to the school’s future. From 1990 to 1997, fifteen faculty members and three staff remained steadfast in their school positions, regardless of the tenuousness of their financial future. Faculty raises were minimal; basic employment benefits such as medical insurance, paid sick leave, and professional development continued. Facility maintenance was kept to a minimum, adequate to meet safety standards.

However, the budget projections for academic year 2002-2003, based on an anticipated enrollment of 144, indicated necessary adjustments to employee benefits, development, and reserve funds. A re-examination of the school budget line items and the church’s 2001 annual report led to questions raised by myself, my business manager, and the school board chair regarding the church support fee. Originally regarded as a “mission” of the church in the 1950s, the school provided an obligatory rental fee to the church, equivalent to 10% of the entire school budget. In addition to the support fee, the school was also responsible for all repairs and maintenance to the church-owned facility. According to the church’s proposed 2000 budget, the support fee was to increase approximately 30%, despite discussions about the school’s decreasing enrollment at monthly school board meetings, which the church rector attended.

In October 2002, a memorandum from a school/church task force to the Epiphany School Board board and the Epiphany Church vestry proposed an operating agreement to memorialize principles of the National Association of Episcopal Schools (NAES), which all Episcopal schools under the auspices of a church vestry, should observe: 1) Epiphany School would operate according to the tenets of the Episcopal Church and conform to NAES standards; 2) The school
head, working with the school board, would be responsible for the educational, operational, and administrative aspects of the school; 3) The rector, working with the vestry, would be involved in all religious and spiritual aspects of the school, but not in the school’s daily operations; and 4) Epiphany School and the Church of the Epiphany would work toward a “mutually nurturing and beneficial relationship with each other while placing a high value on each other’s ongoing joint and individual ministries” (L. Kiefer, personal communication, October 14, 2002).

The Memorandum of Understanding would define guiding principles and the roles and responsibilities of the parish, church, rector, school, school board, and school head.

The proposed Memorandum of Understanding was the church vestry’s formal response to several years of ongoing developments in leadership at the church and school level. For nearly a ten-year period beginning in the 1980s, the rector and head of school were often in conflict on matters of school operations, attributed to the lack of clarity concerning the rector’s roles and responsibilities. Both individuals were given to occasional emotional outbursts not necessarily overt, but noticeable, affecting the climate of the school and church. Previous rectors were ineffective models of church leadership for the school, unable to manage church finances or effectively communicate.

One exception was Reverend Burton Linscott, who helped literally to construct the church and school in the 1950s with his own carpentry skills and personal funds. He organized the educational program, which was steeped in traditional instructional approaches with emphasis on literacy and numeracy, testing, memorization, and rigorous academic skills. He was an iconic leader of Epiphany as rector and head of school — well respected by the religious and
educational community for his disciplined and even-handed approach to all matters, tempered with respect and compassionate regard for the parishioners, students, and faculty he served. Epiphany’s reputation in the community as a “feeder” to other Hawai‘i schools was born of his tenacity and high expectations. Even when the educational program began to steer towards more progressive practices after he retired as head of school, Reverend Linscott was open-minded about these “new ways of teaching and learning” and supported the shifting philosophy and instructional practices. It was Reverend Linscott whom I approached just before the final decision on the merger to ask for his permission to close Epiphany School.

In response to the October 14, 2002 memorandum, the school board convened to discuss the ramifications of the proposed Memorandum of Understanding. The board acknowledged that the mission identity of the school was no longer relevant since fewer than ten percent of the student population were active members of the church. Although the school offered a Christian Education program, its focus had changed over the years from bible study to the development of inter-personal and intra-personal skills, strongly influenced by Howard Gardner’s theory of multiple intelligences. The tenets of Episcopal doctrine were not necessarily being taught directly to students, and the rector’s involvement in the religious and spiritual education of students was provided through weekly chapel and special religious liturgical services associated with the church calendar. Nonetheless, there was an underlying respect for the Episcopal nature of the school, partly because the community valued the school’s religious beginnings as central to its identity.
Changes in the direction of the school program from “traditional” to “progressive” were initiated by newer faculty members and embraced by most of the faculty, with support from the head of school. Beginning in the 1990s, teachers explored multi-age learning by combining two grade levels, began discussions about an inquiry-driven instructional approach, looked for alternative ways to assess and evaluate student learning, and integrated content areas. The parochial nature of school transitioned to a more broad-minded, less conservative perspective, with parents who were more vocal, more engaged, and more critical of the educative aspects of school.

The impending increase of the church support fee posed a significant threat to the future of the school, its impact having direct bearing on program, staffing, maintenance of facilities, and enrollment. Though parents anticipated a tuition increase every year, the board could not, on moral and ethical principles, impose a higher tuition fee to support the church’s operations and programs. It was difficult to rationalize an increase when students and families who were not church parishioners would not be direct beneficiaries of the increase. Moreover, the proposed increase to the support fee, in light of a declining student enrollment, could only be construed as grossly insensitive to the school’s own operating struggles.

Shortly after the October 14, 2002 memorandum, the school board requested a meeting with the church vestry at a neutral site. Through support from the Hawai‘i Association of Independent Schools, an educator affiliated with the Pacific Mediation Center with experience in mediation process served as the facilitator of the two-hour long meeting. Hours before the meeting, I met with the school board chair to outline our case for becoming an independent
school with severed ties to the Church of the Epiphany. In addition to the school issues described earlier — a program with a different educational philosophy, financial challenges associated with an increasing support fee, a declining enrollment, and an aging facility that required more maintenance — the central challenge pointed to governance. The school was being governed by two legal entities — a school board and a church vestry — with the church vestry as ultimately responsible for all church and school operations and programs. Language in the draft of the Memorandum of Understanding delineated the roles and responsibilities of the vestry, church, school, school board, rector, and head of school, as well as specified that the school would always be expected to operate within the tenets of the Episcopal Church in the Diocese of Hawai‘i and support the mission of the church. A member of the vestry would be required to sit on the school board. In the event of some unforeseen disagreement, alleged breach, default or enforcement effort between the school board and vestry unresolved through process, the final arbiter, after a succession of individuals and groups representing the church and the school, would be the Bishop or Chancellor of the Diocese of Hawai‘i or the Executive Director of the Hawai‘i Association of Independent Schools. In essence, Epiphany School would be governed by the school board, yet the school board would still be accountable to the vestry because of the school’s identity as a parochial Episcopal school. With regard to financial crisis, which often poses the greatest challenge to most organizations, and was the case with the church support fee, the dark cloud over governance still loomed as a serious point of contention.

The meeting, as I remember it, was a turning point in the history of Epiphany School and the Church of the Epiphany. The board chair made an impassioned, reasoned argument for
respectfully separating from the church because the school was not functioning as a “mission” of the church. Less than ten percent of the students and their families were church parishioners, and the church was becoming more dependent on income derived from tuition revenue. The rector traced back to the origins of the school and its destiny as a mission of the church and rebuked the school board for its negligence in ensuring that the school remain faithful to the mission of the church and the educational communities — especially in its care the mission of the school, its direction and purpose. Discussion among members of the school board and the church vestry was tense, intermittently heated, and impassioned. The chairman of the school board at the time recalled, during an interview, the angst and emotional upheaval caused by the events leading to the merger:

*Epiphany Church, I think, was struggling with its own identity in wanting to get back to fulfilling what they thought their mission was. And then we have this school that evolved from being a church school to being a real educational organization that just didn’t service the Epiphany church community but was open to everyone. The school grew in terms of its vision and mission, and there was a lot of tension between the church and school and the school trying to co-exist on the same site . . . . The way it was structured, the agreement between church and school — the church relied very heavily on revenue provided by the school to maintain the church. In my mind, that’s not a real healthy situation for a
church. So a lot of tension, a lot of friction, different vision, different mission, growing apart. (Chairman of school board)

On July 15, 2003, the church issued a copy of the final Memorandum of Understanding, with further clarification on definitions of entities and responsibilities for each entity. Attached to the MOU was a “lease/license” between the Owner (Church) and Tenant (School) extending provisions beyond usage and maintenance of the facilities. A particular section entitled “Finances” addressed the church support fee “in consideration for the right to operate Epiphany School on the premises . . . reflect[ed] in a lease of facilities,” specifying fee payments of $50,000 each year payable monthly throughout the year. In addition, the school would pay a “supplemental support fee” based on student enrollment of 171-180 at $500 per student, and $750 per student above 180 enrolled, with the support fee and supplemental support fee capped at $75,000. The support fee and supplemental support fee would have been subject to renegotiation every five years. This business arrangement would have impeded any efforts on the part of the school to allocate any tuition income toward development or endowment, especially since admissions was a monumental struggle. At a record-low projected enrollment of 144 students for the 2002-2003 academic year, every child admitted to the school was one more chance of survival. Despite offering an intellectually stimulating program, sound educational philosophy, and innovative approaches, Epiphany School’s viability beyond three to four years looked bleak.
Less than five miles away from Epiphany School, around the same time that Epiphany encountered problems with enrollment, financial instability, and a changing educational philosophy, Mid-Pacific Institute’s board of trustees was having its own deliberations about the school’s future. This is not to say that they were the only Hawai‘i schools contemplating their future since a school’s viability is the primary concern of all boards of independent schools; each board’s fiduciary responsibility is to ensure that appropriate means are undertaken so that a school’s mission and goals are implemented through an appropriate educational program and all other necessary supports. Boards are always looking forward in terms of the school’s future. Looking back at this phenomenon of two schools merging, the confluence of events for Mid-Pacific Institute and Epiphany was serendipitous, but the roadmap for Mid-Pacific was also wrought with serious challenges of its own.

One of Mid-Pacific’s distinguishing characteristics was its boarding program. Boarding programs, in general, assimilated students into mainstream life, beginning with learning experiences in a classroom setting. Equally important to academic learning was students’ social-emotional development — self-discipline, independence, and self-reliance — and values such as integrity, respect, patience, and cooperation — in community. Since Mid-Pacific’s beginning in 1908, students lived on the campus and experienced school life together as a community — classroom learning, meal times, social events on and off campus, recreational activities during the day, even religious activities such as morning and evening prayer. Boys and girls lived in separate facilities on opposite ends of the campus. It was an idyllic setting for a boarding...
program on more than thirty acres of property that students could call home. Single-gender learning continued up to the 1950s; thereafter, classes were combined. The boarding population was usually a diverse ethnic enrollment of mostly Asian students from Japan, China, and Korea, with students from O‘ahu neighborhoods in MPI’s early years. From the 1960s, more students were enrolled from the Pacific region — Micronesia, Palau, Tonga, Majuro — adding to the mix of local students from the islands of Kaua‘i, Maui, and the Big Island of Hawai‘i.

School enrollment in the 1970s was approximately 250 boys and 250 girls but then declined in the 1980s, which became a budget concern. The cost for operating a boarding program consumed most of the school’s overall budget due to salaries for full-time staff (a director, counselors, cook, nurse, etc.) who lived on the premises; activity and meal expenses; and facility maintenance. The challenge of covering boarding program costs, added to the overall costs of the educational program, such as faculty salaries and benefits, and curricular materials, was a constant concern for the administration and school board. For this reason, day students were admitted as a financial measure to offset boarding costs. In 1970, tuition for a boarding student was $1,500; day student enrollment had not begun. In 1980, a day student’s tuition was $2,000, compared to $3,000 for a boarding student. In 1990, a boarding student’s tuition was $7,725; the day student’s tuition was $4,825. By 2000, boarding tuition rose to $15,920 with day student tuition at $9,585. Boarding enrollment dwindled from 500 students in 1970 to 70 students in year 2000, and it became increasingly difficult to find families seeking a boarding program for their children. The boarding program enrollment had decreased over 150%!
board of trustees had been monitoring its steady decline, and clearly the program was not fiscally feasible, as all indicators pointed to its demise.

However, alumni were the staunchest advocates for continuing the boarding program. Interviewees who were alumni of Mid-Pacific Institute shared memories of their boarding experiences — eating meals, housekeeping, doing laundry — turning the mundane into the extraordinary while creating a unique boarding culture with its own traditions.

. . . *Everything that we did revolved – evolved around the dorm.* So, even on weekends, you know, the people who we hung out with were boarders, and it was geared around the structure of the dorm in terms of when you can leave and when you have to come back and head checks and just, you know, everything. And so, there were — the dorm counselors. A large part of their job was to make sure that our social lives were met for that age group. Kids like — all times about traditions and things like that back then, all the traditions revolved around - somewhere revolving around the dormitory, the boarding program and the dorm residential life, which is why if you’re a day student back then when we first started integrating, you really were kind of left out of it because there wasn’t a whole lot of stuff for the 20 kids that were day students. Everything else was still geared toward the residential program. *One of the great things that we – that I missed is the eating together part. We ate three*
meals together. We ate breakfast, lunch and dinner -- all together every time and the whole school could fit in there. Family style, we sit around the table and they bring out food and you pass it around. You take your portion and you know, so it really...it really was a family. (staff, alumnus)

Nostalgia was a recurring emotion with two other interviewees. Although one interviewee was only a two-year Mid-Pacific student who transferred to another school in 1972 for academic reasons, his impressions were vivid and animated. He spoke, looking past me, focused on some very specific memories:

We had the inspections and whatever, but the other thing I recall was because a greater majority of the students all came from outside the island or outlying areas because it was tough to transport back and forth. So every Friday afternoon, these guys would be in the laundry room washing their clothes, ironing. All I do is pick up all my laundry, put it in a laundry bag, and mom would come pick me up. So Sunday evening I would come home, clothes all ironed on the hanger. But it was a great experience for me I think to grow up. I can say and meeting all these classmates from the other islands. (staff)
Dorm life grew beyond weekend chores into navigating the social terrain and crossing relational and cultural borders —

*Living in the dorm was a good experience for me getting to know these outside other kids much closer. But because we were all dorm students, so we were settled up here and we had events Saturday evening, every other weekend, so we had to stay in the dormitory. We could go out Friday but come back. We can go out Saturday, had to come back and stay in the dorm and all those odd weekends we could go home for the weekend. So most of the outside island students, although they could have had families living on O‘ahu, cousins or—they all stayed here. So for them to go back I guess those day it could have been too costly for some of the families.* (alumnus)

— and learning to overcome the gawkiness of adolescence in the presence of the other gender.

*We always grumbled about what we ate, but they served us a balanced meal. But I was always kind of — I wasn’t intimidated, but I was kind of a shy guy, I guess. We would have*
assigned seats in the cafeteria. This was the thing that I remember, so that the head of the table was always a senior. Then we had different members of different classes seated on a table of eight, boy-girl, boy-girl. So we would have to eat three meals daily like that, every six weeks we rotate, you go to another table. So I guess we learned manners, not much conversation. I know I wasn’t much of a conversationalist, but then I think when I was a junior, the basketball coach created a training table so the boys in the varsity basketball team didn’t have to sit with other students. So we had our own table, and the table was right outside the teacher’s lounge, so we were always under surveillance so we had to behave. But at least we didn’t have to eat with girls, so that was a big perk for us.

(trustee, alumnus)

More than sixty years later for one alumna, the most important value of her experiences as a dorm student was “learning independence and how to take care of yourself” in addition to the lifelong friendships that are not only celebrated at alumnae class reunions but also in the way that they commonly regard one another as “you know — family.” The entire culture of the boarding program from its historic roots and values-driven curriculum, to the deeply felt emotional connections to a sense of place
and sense of other in community was entrenched in Mid-Pacific’s identity. So despite the data on declining enrollment, the boarding program was intended to remain intact.

The development of the middle school program began with the opening of the first seventh grade class in 1976 as a strategy to increase enrollment and to better prepare students for the rigorous college-preparatory program in the high school grades 9-12. (Historically, Mid-Pacific Institute enrolled students as young as age eight when it was Mills Institute for mostly Asian boys, but this admission policy was abandoned around 1930 when it became increasingly difficult to attend to the needs of young children and to find faculty with expertise to teach a wide range of ages.) As students matriculated, an eighth-grade class was formed. One principal was responsible for the grades-seven-through-twelve educational program, which bore all characteristics of a college-preparatory curriculum. According to William Alexander, then chairman of the department of education at George Peabody College for Teachers in Nashville, who is said to have given birth to the notion of middle school, many junior highs “had merely appended high-school practices on to the 7th and 8th grades . . . so the bridge had become simply a vestibule added at the front door of the high school” (Meyer, 2011). Mid-Pacific students in seventh and eighth grades were being taught by high school faculty who, for the most part, were not trained to teach preadolescent students.

It was only in 1997 when a sixth-grade class opened with the intent of instituting a middle school composed of grades six, seven, and eight. This was about the same time that
middle schools were being formed in Hawai‘i, following on the heels of a vigorous middle school movement already underway on the continent in the mid 1980s. Fifth and sixth grades, but primarily sixth grades in many elementary schools, were appended to intermediate or junior high schools to form middle schools for the primary reason of attending to the developmental needs of the preadolescent student.

In 1997, the middle school was formally instituted with the hiring of a middle school principal who selected high school faculty interested in teaching middle school grades. Apparently, this process became very contentious among the faculty who felt that the best teachers were being chosen for the middle school. In addition, the middle school created its own schedule separate from the high school bell schedule, which further alienated middle school and high school faculty. A faculty member described the formation of the middle school as “causing a real fissure, I think, socially. . . . that had repercussions within the school. You know, if people are mad at each other, it’s hard for them to work together.” He continued —

*I feel like the stress was much more on traditional education and the big thing that happened right around that time besides you guys starting to migrate over here was the schedule change, the 7th – the split between middle school ...and elementary school. And so, there was kind of, I think, maybe a sense of division especially with the high school faculty, there was a sense of – I don’t know, I’m trying to think of a better word than ‘betrayal,’ but I feel like a lot of them*
felt betrayed. So, there was a — I really felt like that was one of the dark periods where just in terms of morale. (faculty member)

An alumnus, who is also school staff, revealed similar feelings about the middle school, from the perspective of how the program was changing its historic roots as a high school college-preparatory program:

To me I felt a bigger challenge when we instituted this middle school concept as opposed to the elementary school concept because for a while there, it was kind of one principal and the teachers taught different levels. So, you’d have teachers that taught 7th and 8th graders who also taught 9th, 10th, 11th, 12th. Math was basically 6th through 12th steady curriculum all the way through overseen by the Math Department. And then when the middle school kind of split off, and they made their own schedule and they brought over the middle — what is now the middle school staff and faculty — now there was a distinct split between middle school faculty, and we’re not — we’re a high school faculty. To me that was a bigger challenge and more distractive to the way we did things.

(alumnus, staff)
Interviewees implicated the high school and middle school administrators as contributing to the growing rift within the school —

*I think the bigger adjustment came with the middle school brought their own principal who wanted to do things his way. And then our high school principal wanted to do things his way, and so there was butting of heads at times.* (staff member)

...I feel like at the time if the high school principal had gotten ahead of that and not brought on this whole, “Oh, those awful middle school people breaking away from us,” I feel like that change would have maybe gotten a bit smoother. I don’t think we would have eliminated all the acrimony, but I think we could have gotten ahead of it. (faculty member)

Learning about the middle school issues during the interviews was an unanticipated discovery, and given the events and outcomes that have since come to pass in the merger between two schools, I would venture that I, as head of Epiphany School, would have continued to pursue the merger in order to accomplish the greater goal — surviving the impending demise of Epiphany School’s educational program and the beliefs of the community that made it unique. Against this multi-layered context of tumultuous relationships, a sea of changing emotions and complex
circumstances, Epiphany and Mid-Pacific Institute were poised to enter into a two-year process of courtship.

**Courting the Relationship**

Mid-Pacific Institute had apparently been considering an educational partner several years prior to considering a liaison with Epiphany School. According to a former school president, he initiated the search and plan in an attempt not only to change MPI’s less-than-stellar image in the community, but also to expand the school’s program through an increase in enrollment. Although the board of trustees agreed with the goals, they were not immediately open to the idea of adding an elementary program.

*Mid-Pacific was going through a process of discussing how it might be to our benefit in many areas to have an elementary school attached to our middle and high school program. I had long advocated since way back in ‘96 that that would be in our best interest. However, the board wasn't exactly enamored with it. They would like to see our secondary program grow and prosper...*

*And so, we had been talking off and on, the Board and I, about that, and I didn’t have a lot of followers in the beginning, but I kept after them talking about how we were trying to move our image in the community, how we might be as successful as some of the larger schools that were K-12, and how many years they had been that,*
and how we were fighting a battle for students, how we weren't perceived in the same way as some of the other peer schools . . . that were larger and also had elementary programs. . . .

So at that time, we started discussing the options, and this is getting close to 2000 now, and what are the options for this. Well, certainly building your own starting with a Kindergarten class and next year adding first and then you add a new group. And over six or seven years, you have an elementary school.

Another option was affiliating yourself with an existing elementary school that would just send all their kids to you, but you wouldn't control curriculum and structure and hiring or any of that stuff. And the third choice was to find a school that you felt was aligned with your own personal beliefs of how young children should be educated, and to pursue a relationship with them. And if it was possible to merge the schools together, take a look at that, or purchase, outright purchase, that sort of thing.

(former Mid-Pacific administrator)

Before becoming president of Mid-Pacific, he had been principal of a successful multi-age elementary school, on the U.S. west coast, with an integrated curriculum and performance-
based assessment practices. A few board members who were interviewed recalled ventures from land developers offering real estate on the west end of O‘ahu to build an extension of Mid-Pacific Institute to serve the population of second city Kapolei. Another independent elementary school in the area was also considered to become MPI’s elementary; however, the educational program, in the school president’s estimation, did not mesh with his own educational philosophy. So it made sense that he had considered two nearby independent schools in Hawai‘i as a potential partner— a preschool/elementary Montessori school and another well-established elementary with a solid educational program. Both schools shared characteristics that appealed to him — a multi-age instructional approach and organization of the school community; a child-centered program and recognition of the developmental growth of children; assessment and evaluation practices appropriate to the learner; and school leaders who were well-respected for their educational philosophy and for managing close-knit schools. Although Mid-Pacific had been admitting Epiphany sixth graders into the middle school ever since Mid-Pacific announced its opening of a middle school in 1997, he had never considered Epiphany as a prospect until one of the heads of an elementary school mentioned Epiphany as the first independent school in Hawai‘i, outside of the Montessori system, to implement a multi-age structure and instructional practices to support this approach. He admitted, “. . . that was my first indication about Epiphany as being a school that was different than many of the ones that I knew here in the state.” Following the lead, he checked on the academic records of students from Epiphany who had been admitted to Mid-Pacific Institute in previous years, which provided more information he could convey to the trustees.
Meanwhile, the board of Epiphany had been reviewing enrollment trends at Epiphany and other small elementary schools in Hawai‘i. From 1990 to 2000, the population of children under age 5 decreased .4%, from approximately 83,000 in 1990 to 78,000 in 2000; the population of children in the age group 5-9 increased slightly, .4%, from 80,900 in 1990 to nearly 85,000 in 2000 (“Demographics,” n.d., p. 1). Hitting close to home, an elementary school less than five miles from Epiphany was forced to close its operations due to declining enrollment. Even with this school closure, only three families approached Epiphany to admit three students. This data, in addition to the mounting pressure from the church vestry, prompted the board to seriously take action. As board members are often business leaders whose networks overlap in the community, an Epiphany board member had learned of Mid-Pacific Institute’s plans for an elementary school. I was asked as head of school to meet with the Mid-Pacific president to explore possibilities for strengthening and expanding the relationship between our schools. Specifically, the proposed alternative was to ask the MPI president about admitting Epiphany sixth graders without having to require admissions testing.

During an annual spring retreat for Hawai‘i school heads of independent schools, I met with Mid-Pacific’s president during a coffee break. At the end of the morning session, I leaned over the table to where he sat four seats away and called out his name just as everyone stood, and he did likewise. It was a not a chance meeting, but very deliberately orchestrated on either side, with directives from our respective board members to initiate discussion.

That's when it all came together, and you're right, that’s it exactly.

So when people ask me this question, "Do you think of anything
what it was just like at the time?" I thought — We're sitting there when I knew, God-willing and a little effort on our part, we can do this, but we have a board that was on my side that was kind of reluctant about, "Will this really do anything for us?" And you have a church board plus another board that you're working with, and the thought of pulling three different boards together was a daunting thought. . . . But I believed, and I think you did, too, that if there's a will that this is in the best interest of our children and our schools, we can -- we'll just go for it. Let's do it. So we became a united force and I know we had meetings with each other's boards and brought people together. We had key people on our board. I know that you had a couple that were extremely accommodating and wanted to know, wanted to learn with the thought that this will be helpful to the survival of our school and program that we love, and if we can find something where they'll be accepted as who they are instead of we're going to get them and then we'll change them to be what we want them to be. (former MPI administrator)

The next meeting took place at Mid-Pacific Institute with myself and the chairpersons of our respective school boards, not unlike the formality of a prospective couple with their parents at an initial meeting. Successive meetings included more and more ‘members of the family’ at the board level. I presented Epiphany’s educational philosophy, program, and instructional
approaches to MPI Board members. I discovered that an influential board member was unsupportive of Epiphany’s program and, by virtue of his position at a prominent banking institution, attempted to wield his influence on other board members. But the former president persevered and was able to convince trustees that Epiphany should be pursued.

*And our board here was relying on me more as the one that would know that this is the right school, the right group, and the program was right because at the time, our board didn’t have a lot of education kind of background people, business leaders and such, so they had to have faith in me and a willingness to allow me to pursue what I thought was in their best interest.* (former MPI administrator)

Once both boards agreed to proceed with the merger, and I fully understood that a merger was plausible, I convened the entire Epiphany faculty and staff of twenty in a classroom on a late Friday afternoon. It was time to tell the family members about the possible future liaison. I remember the weeks prior to the meeting, rehearsing what I would need to say, agonizing over the feedback I might receive from them, fearful of their lack of trust in my leadership and what could be the demise of the school, its unique culture, and for some, the professional and personal relationships spanning over twenty years. The burden of responsibility for an entire community, albeit small in comparison to other schools, was nonetheless terrifying.

I had arranged chairs so that everyone faced me directly. I wanted to be able read their eyes and facial expressions so that I could gauge how they would be receiving the news. They entered the classroom quietly, uneasily, with as much fear as I had harbored; requiring the
attendance of every employee had never happened before during my tenure at Epiphany. I provided background information on the factors leading to Epiphany’s potential closure — declining enrollment, budget constraints impacted by the church, an inability to expand the school due to its location landlocked by neighbors unwilling to sell their property, and an imposing freeway. Information about Mid-Pacific Institute related to expanding programs that had been gaining community attention, such as the School of the Arts, International Baccalaureate, and the innovative technology facility. I assumed that the faculty had already some opinion of Mid-Pacific Institute. A teacher who had been at Epiphany two years before the merger offered her impressions of Mid-Pacific’s reputation during an interview:

> When I was growing up the Mid-Pacific students, many of them, not all of them, had issues. You know, at one time, drugs were kind of prevalent within the community unfortunately. Not everybody, it wasn’t you know, across the board. There were a lot of really good kids. So it wasn’t looked on very positively necessarily early on, but it was also very more of a local school. (elementary faculty)

A staff member, also an interviewee, was blatantly forthright: When I was going to school, Mid-Pac was kind of the reject school. I kind of hate to say that but it was a school that you went to when you couldn’t get into the top tier schools. Another faculty member explained candidly:

> I actually unfortunately heard of it as almost like the second or third rate school. I guess if kids couldn’t get into certain well-known schools, then they went to Mid-Pacific. And then that was okay, you
know, that was like the next best thing. But I always heard of it as a kind of like . . . a second choice school, but also that it did have a really good reputation as being – with getting kids into colleges because it was so academic. (elementary faculty)

If there were any widely-held negative perceptions of Mid-Pacific Institute, no one raised an opinion, concern, or question regarding the school’s uneven reputation in the community. Instead, they seemed to focus on what I offered next.

I painted two scenarios for the employees. We could stay the course, struggling to hold on to every student (the sixth grade class had dwindled to nine students, and more students were exiting after third grade) and continue to provide an excellent educational experience for fewer and fewer students with the real possibility of budget cutbacks. Or we could choose a second life as another school in order to preserve the educational values and faculty-developed approaches, maintain our professional community, reap the benefits of job security, and profit from the rewards of seeing our students matriculate into middle school and high school. I even went so far as to boldly propose that we become part of Mid-Pacific Institute so that we might impact the school’s identity. A staff member recalled —

I think the excitement that surrounded that possibility along with the fact that Edna was able to convince most of our teachers that the move would be a good thing. Teachers had settled into the Epiphany program, developed the Epiphany program, and were very guarded about changing anything in that program, hoping that it wasn't that
Mid-Pac was so anxious to get us to come over and then make changes that we didn’t like. I think Edna spent – she spent so much time and effort in convincing everybody that this would be a good thing and that the way the school would adapt would be by changing Mid-Pac’s philosophy and moving our Epiphany children up through those grades.

That indelible afternoon, I left the faculty and staff with an image to ponder — a ship that was slowly and surely sinking unless we jumped one vessel for another. I explained that each person would be able to choose to continue at Mid-Pacific Institute or to end their professional careers at Epiphany. And finally, I asked them to trust me and to know that I would never abandon them. If needed, the captain would go down with the sinking ship.

The following Monday, I learned that most of the faculty gathered at a colleague’s home immediately after the meeting to deliberate their choices. Two representatives came to my office at the end of a long school day made unbearably longer because of the interminable wait for their response. With the exception of two staff members who intended to retire, the faculty and staff response was unanimous with unflinching approval despite the challenges that still lay ahead.

**The Merger Process**

*“So many moving parts”*

Forging a union between two schools involves a process of due diligence for both partners — financial, legal, and educational. These matters are undertaken by the boards of partner schools, and the boards, in turn, identify members with the professional expertise or form
ad hoc committees. School mergers or consolidations are undertaken primarily to address two presumed benefits: 1) fiscal efficiency and 2) improved educational quality. By definition, a merger is a contractual and statutory process whereby one corporation (the surviving entity) acquires all of the assets and liabilities of another corporation (the merged corporation), causing the merged corporation to become defunct. A consolidation is also a contractual and statutory process in which two or more corporations jointly become a new entity (successor corporation), and the original corporations cease to exist and do business. The successor corporation acquires all of the assets and liabilities of the original (now defunct) corporations. ("Merger & Consolidation Overview," n.d., paragraphs 1-4). In the case of Mid-Pacific Institute and Epiphany, the process was a legal and financial merger — Mid-Pacific Institute acquired all of Epiphany’s assets and liabilities, resulting in the closure of Epiphany and its school board. The merger process, in general, requires that the boards of each original corporation must approve of the plan to merge and approve by vote at a scheduled board meeting. In the acquisition of all assets of another corporation by direct purchase, the purchasing corporation extends its ownership and control over additional assets. The approved plan is filed with the State of Hawai‘i, and certificates verifying the merger are issued to the surviving corporation. This plan, which sounds deceptively simple, was nearly a two-year process for Mid-Pacific and Epiphany, with many complications. There was no sense of linearity about the process, with one phase clearly ending and another phase emerging. The principal negotiator for Epiphany put it aptly —
So this was a very complicated process because there were so many -- so many moving parts. I because I do this kind of thing for work I think that this is just part of the course, there's always challenges in any deal and when you are dealing with so many different parties who have their own agendas and their own objectives, you really need a lot of patience to kind of work through everything to make sure that at the end of the day everybody comes out hugely satisfied. And I think it did at the end of the day. Getting there wasn't that easy. (Epiphany legal counsel)

At the board level, Epiphany had to contend with three issues: the school’s relationship with the vestry as lessee of church property; the school’s lease of additional properties with another lessor; and the relationship with the representatives of Mid-Pacific Institute. Of the three areas, working through the merger process with Mid-Pacific board members assigned to the merger was the least contentious because the goal of both school boards was for Epiphany to become Mid-Pacific Institute, thus the collaboration to achieve a mutually beneficial solution was a priority. Two of the principal Mid-Pacific negotiators, both parishioners of the Church of the Epiphany, understood the culture of the church and were cognizant of the role of the vestry, the church’s governing body. However, Mid-Pacific Institute would not proceed with the merger unless the Epiphany School board resolved its liabilities of the church lease and a separate lease with a private landowner for adjoining property the school used as classrooms and offices.
As tenants of the church, the school board felt obligated to find a new lessee so that the church would not lose a significant income source. Terminating the lease could have left the church financially bereft of revenue on which they had become dependent. A large non-profit corporation with campuses on different islands expressed interest in the Epiphany School facilities for an early learning center. Representatives offered to make certain improvements to the property to accommodate their needs, which would have been mutually beneficial to the church since the aging facility required repair and maintenance. However, the church vestry declined the offer, leaving Epiphany School with no other alternatives after working several months on this potential solution.

The major challenge for the Epiphany board was actually the 30-year lease with a family for cottages the school had renovated and painted into colorful classrooms and offices. In the original agreement, the landowner had planned to demolish the cottages, which were in need of repair, but the school board offered to renovate and use the buildings for classroom space. At that time in 1995, the landowner did not object. In 2002, Epiphany School representatives met with the landowner’s representative to ask for a lease termination because of the opportunity to merge with Mid-Pacific Institute. A lease termination would be possible pending the full restoration of the once-condemned buildings into rentable homes. The school board quickly realized that attempting to renovate the cottages was impossible, considering the school’s dire financial straits.

The Mid-Pacific Institute board of trustees faced its own proportionate challenges in the merger process. After both school boards agreed to the principal terms of the merger, a two-year timeline was projected to open Mid-Pacific’s new elementary school in 2004 in the Wilcox dorm
facilities, which currently housed the sixth grade and administrative offices. During one of my meetings with the Mid-Pacific president, I had toured the facilities, envisioning the new home for the elementary and preschool and the renovations required to accommodate the age range of students. Having experienced the maintenance challenges on the Epiphany campus for several years, I felt that moving to a well-maintained facility would be a welcome change for the Epiphany community.

Unfortunately, in summer 2003, structural engineers tasked with planning the renovations for the elementary school discovered a vertical crack in the first floor wall of Wilcox that continued to widen with frightening speed over a few weeks. Engineers condemned the building, prompting the evacuation of all boarding residents, sixth grade students, and the administration. Temporary facilities for boarding students were arranged at a hotel. The administration offices were moved to temporary cottages quickly constructed, and the sixth grade classes were moved to a temporary free-standing structure on campus, then later to classrooms closer to the high school. The board agonized over the decision to close the boarding program despite opposition from alumni, weighing the economic opportunities a preschool and elementary could open for Mid-Pacific Institute. If there had been any hesitation about terminating the boarding program, there was now immediate impetus with the demolition of the dorm facility. With the merger process still in motion, the Mid-Pacific board was unprepared for this unexpected challenge.

Designing and building an entire elementary facility in one year, in addition to finding the financial resources, was nothing short of a miracle. In 2001, the State of Hawai‘i Constitution had just made available special purpose revenue bonds (SPRBs) to qualifying private schools to
assist with capital improvement projects. These loans were made available to private businesses at interest rates lower than rates offered by commercial lenders. The State makes a capital improvement loan by selling SPRBs to private investors who actually provide the funds for a capital improvement project and bear the risk of nonpayment in return for interest payments that are exempt from both federal and state income taxation (Carter-Yamauchi and Fukumoto, 2001). Selling SPRBs was appealing not only because of the low interest but because it was also a way for the State to loan funds for private business projects found to be in the public interest by the Legislature without spending taxpayers’ money. Choosing the SPRB route required that Mid-Pacific secure bond counsel and acquire bond insurance, investors, a securities firm, and other key factors associated with the SPRB.

While the SPRB application process had begun, Mid-Pacific Institute launched a search for an architectural firm to create a design-build process for the construction of a preschool and elementary school. From this point forward, I was involved in every aspect of the design and construction of the school. Once an architectural firm had been vetted, several Epiphany faculty members participated in a charrette — a period of intense design activity with all stakeholders — with an entire design team (architects, engineers, interior designers, and landscape architects). We discussed at length the philosophy of the existing elementary program and the selection of a well-established preschool system in Reggio Emilia, Italy, as the inspiration for Mid-Pacific’s proposed preschool, our views of teaching and learning, our beliefs about learners, and our ideal vision of a preschool and elementary school facility. From these discussions emerged the concept
of a town village of houses surrounding a central courtyard, suggesting the popular African adage of a village raising a child.

While the Mid-Pacific board focused on the construction of the preschool and elementary and set full speed ahead on the SPRB, the Epiphany board continued in earnest to find a new tenant for the church. Between 2003 and 2004, the obstacles impeding the merger gradually dissolved. As news travels far and wide in an island community, I wasn’t surprised to receive a phone call from the proprietor of an early learning program who was looking for a satellite location to expand her business. I introduced her to the rector of the Church of the Epiphany, hopeful that there would be interest in leasing the church-owned facilities. As it turned out, the owner eventually became the new tenant about a year after we left the Epiphany property. To this day, it is unclear why the property owners of the cottages on the property adjoining the church agreed to the dissolution of the lease between the Epiphany board and the landowner, considering the history of negative encounters. An agreement was eventually reached with the Epiphany board paying a sum of money to end the lease without being required to restore the cottages to residential homes. The Epiphany negotiator quipped during the interview, “Sometimes you’re good, sometimes you’re lucky. I’m not sure which one we worked by.”

As it became clearer that a merger was imminent, I worried about the integrity of Epiphany’s educational philosophy and its implementation in the program that had evolved from faculty collaboration and their progressive thinking. Even though Mid-Pacific’s president had assured me that there would be no changes imposed on the elementary school program, I was uncomfortable about the lack of a written agreement regarding the educational program. I drafted
a Memorandum of Understanding, outlining the educational beliefs underpinning the elementary program and descriptions of the instructional and assessment practices. I faxed the MOU and mailed a copy, but did not receive acknowledgement from him that he had read the memorandum. During his interview for this dissertation, over ten years ago after I had written the MOU, he explained that his board advised him not to take action on the MOU, which would have legally required approval from the entire Mid-Pacific Institute board. His advisors felt that MOU approval would have delayed the merger process, anticipating dissenting views from a few board members who could have derailed the merger. Even though the MOU was never approved, I was satisfied that he had read the MOU and, perhaps, appreciated the articulation of beliefs he must have also held for Mid-Pacific Institute.

With two major problems resolved — a new tenant for the church and the dissolution of the lease agreement with another landlord — the remaining legal and financial issues were the purchase of Epiphany’s assets since there were no other liabilities for which Epiphany was responsible and approval from the church vestry to close the school. Every item belonging to Epiphany School — computers, curricular materials, furniture, books — was itemized and assessed a depreciated value. The bill of sale for Epiphany School also included a value for the educational program, and the total six-figure amount was paid to the Church of the Epiphany. While the church vestry had been empowered to vote on the closure of the school, permission from the bishop of the Episcopal Diocese was also required. The Epiphany board chairperson and I as head of school met with the bishop to discuss all proceedings. As spiritual head of the Episcopal Diocese, his concern was for the continued spiritual growth and development of the
students. I assured him that Mid-Pacific Institute maintained close ties with the United Church of Christ, to the extent that the school’s mission statement contained language about its Christian heritage, and that all students would be required to attend weekly chapel services, a long-established practice of Mid-Pacific Institute. Although we would not continue our Christian Education program at Mid-Pacific, I described a proposed character education program, which would emphasize the importance of a values education and peer mediation program. The bishop wished us well, his approval secured.

Even with financial, legal, and educational matters cleared, I felt final approval from one person was yet unresolved. I asked the rector of the Church of the Epiphany to schedule an appointment with the Reverend Burton Linscott, who had been attributed the honor as founder of Epiphany School. I felt a deep emotional responsibility for having a significant role in closing his beloved school, and I needed reassurances directly from him that he approved. I remember well that early afternoon in May 2003 when the rector brought Reverent Linscott to my office. He greeted me warmly, sat in a chair with the rector beside him, and removed his hat, his hands resting on the armchair. I related, in short, the challenges and resolutions leading to this afternoon, wanting to know his reactions, and ultimately, asking for his approval. He expressed confidence in my leadership, believing that I had the best interests of the children at heart. He laughed, “Well, of course, I want you to move the school to Mid-Pacific Institute! With all these problems here, our children need a new home!” I cried, greatly relieved to know that he approved, determined that the Epiphany spirit would endure beyond the school’s closure.
Early Transition Years: 2004-2006

Nearly a year after Epiphany had become Mid-Pacific Institute, the chief negotiator for Epiphany stopped by my office and handed me a large white envelope. He explained that he had compiled all of the legal documents pertaining to the asset sale and purchase, the lease termination of property used by Epiphany, and the dissolution of Epiphany School. A quick review of the fifteen documents immediately revived the experiences of a two-year process, and as he had put it, “a historic process” that led to new beginnings for Mid-Pacific Institute and Epiphany as their preschool and elementary. These documents summarize the key events of the nearly two-year process following a prior year of informal but necessary meetings that lay the groundwork for legal proceedings:

• Asset Sale and Purchase Agreement (Epiphany School and Mid-Pacific Institute), December 17, 2003
• Epiphany Church’s Consent and Covenant Not to Compete Agreement (Epiphany Church and Mid-Pacific Institute), December 17, 2003

Note: Epiphany Church agreed not to re-establish for five years a school bearing the name “Epiphany School”

• Certification of Secretary of Epiphany School dated September 27, 2004, with copy of resolutions duly adopted by all directors by unanimous written consent, June 22, 2004
• Bill of Sale (Epiphany School and Mid-Pacific Institute), August 1, 2004
• Termination of Lease (Epiphany and landowner), August 31, 2004
• First Amendment to Asset Sale and Purchase Agreement (Epiphany School and Mid-Pacific Institute), October 27, 2004

• Bill of Sale (Mid-Pacific Institute and Epiphany School), October 27, 2004

• Bill of Sale (Epiphany School and Epiphany Church), October 27, 2004

• Assignment of Sales Proceeds (Epiphany School and Epiphany Church), October 27, 2004

• Articles of Dissolution of Epiphany School, October 28, 2004, (filed November 1, 2004 with the State of Hawai‘i, Department of Commerce and Consumer Affairs, Business Registration Division.

• Transmittal letter to landowner (Epiphany School and landowner), March 16, 2005

• Second Amendment to Asset Sale and Purchase Agreement (Epiphany School and Mid-Pacific Institute), May 31, 2005

While these transactions occurred primarily at the boardroom level, those most directly impacted received information relevant to them and in ways intended to reduce fear and anxiety, as often happens in mergers with the entity being acquired. Parents attended meetings led by the Epiphany School board chair and the president of Mid-Pacific Institute. During weekly faculty meetings, I provided updates without burdening them with the technicalities, particularly how we would reconcile their years of service related to salary, unemployment insurance (COBRA), and accrued vacation days for staff. On February 3, 2004, six months before Epiphany would become Mid-Pacific Institute, I proposed a transition committee composed of the three principals (elementary, middle, and high school) and two representatives from each level. Our purpose
would be to identify concerns and questions raised by constituent groups, create a timeline of tasks and events to educate our communities, and to report the transition process to our respective colleagues. Though the transition committee began late in the process, six months before the elementary would be moving to the Mānoa campus, it was a collaborative effort from which the elementary members benefitted.

**Calm before the storm**

The first year (academic year 2004-2005) Mid-Pacific Institute elementary operated would be best described as the calm before the storm. With the condemnation of the Wilcox boarding facilities on the Mānoa campus due to structural issues, the elementary was forced to remain on the Kaimukī site while a new facility was constructed. A Mid-Pacific board member reflected on the one-year delay to remain on the Kaimukī site as a “blessing in disguise”:

* I think some of the traumatism was probably mitigated by that event [construction of new elementary facility] because I think for one year, Mid-Pacific was on Epiphany’s campus. There was a sign called Mid-Pacific on Epiphany’s campus. Students identified with Mid-Pacific. They knew that they were going to come over. They were excited about a new facility being built. There was a smoother transition, I think, as a result of that because students and faculty and parents understood we are now Mid-Pacific. (MPI trustee)

There was excitement and renewed energy, even from the church, about the school’s relocation. We bused the entire school, about 150 students, faculty and staff, to the groundbreaking
ceremony and invited parents to attend the ceremony. A large schematic of the architectural plans for the new preschool and elementary was posted on a bulletin board outside the school office. Updates and photos were added periodically. Two multi-age classes of third and fourth graders had begun a year-long inquiry on the design, planning, and building of a school facility. Students interviewed the project manager, architects and engineers, visited the Mānoa site to collect data, and posted their findings on the bulletin board by the office. It was important to me and the faculty that our students, our most important stakeholders, would be consistently involved in learning about their new home and the school they were already becoming. I also began writing weekly blogs to communicate with families and the wider community about the ongoing transition to Mid-Pacific. And although the dissolution of the Epiphany School board was completed in October 2004, board members could access the blogs for updated information on the new preschool and elementary for which they had helped to pave the way. One Epiphany board member was nominated to continue on the Mid-Pacific board of trustees to oversee the transition process (and has remained on the Mid-Pacific board since 2004).

It may have seemed to the general public that becoming Mid-Pacific Institute was as simple as posting new signs with the Mid-Pacific Institute logo and school name on several walls of what had been Epiphany School for nearly seventy years. The prominently-placed signage indicated we were no longer Epiphany School, and we continued the day-to-day business in the office and classrooms relatively unchanged. The elementary receptionist answered incoming calls with a cheerful “Mid-Pacific Institute!” The elementary business manager, who would be employed only another year before retiring, began adjusting invoice and billing procedures to
Mid-Pacific policies and protocols. I attended weekly administrative meetings on the Mānoa campus primarily to oversee the construction of the new preschool and elementary facilities. I talked briefly about Mid-Pacific Institute at every monthly assembly with students the year before the move to Mānoa, while parents received weekly blog updates focused on the construction of the new school.

The clash of school cultures

Although the much-anticipated anxiety from faculty, students, and parents, for which I had steeled myself, did not readily manifest itself, assumptions, speculation, concerns related to internal integration, the insecurities of new membership, and challenges to school identity brewed beneath the excitement of the move to Mānoa. The survival of the Epiphany culture — the “very essence of ‘groupness’ or group identity,” according to Schein, as the culture of that group — the “shared patterns of thought, belief, feelings, and values that result from shared experiences and common learning” (Schein, 2010, p. 73) — was threatened by the very notion of becoming Mid-Pacific Institute. Nearly seventy years or three generations of students matriculating through Epiphany would no longer continue to regenerate through new enrollment.

The Epiphany faculty subculture and its ways of thinking, planning, strategizing, and teaching, given its history of development in its own unique space and context, would soon be enveloped into another culture with its own “rules, norms, values, and basic assumptions” (Schein, 2010, p. 69). A faculty interviewee expressed her fears —

*The questioning and how the existing staff would accept and feel about us as newcomers coming in . . . to a new situation. Would we*
be accepted? How would we be viewed? I remember that last meeting at Epiphany in a classroom upstairs, and then I think the concern many of us had was — what can we keep in mind — and I think we agreed to keep the heart of Epiphany. And it was a little hard keeping it here because MPI was so big, and then I think we were so involved in trying just to set up, getting to know the newness that it was hard to keep the view of the heart. (elementary faculty)

If cultural clash was imminent, the faculty and staff were particularly concerned about the reactions from students. We understood their developmental need for stable routines and familiarity with their environment as conditions for emotional safety and security. Several students discussed with their teachers some anxiety about the impending transition, so to this end, we involved the students in the plans for packing and sorting materials. As a schoolwide assignment, all students from kindergarten through fifth grade and every member of the elementary faculty and staff identified a place on the Epiphany campus that was special to the individual. All were asked to memorialize their thoughts about the significance of these areas in writing, drawing, or photographs, which were compiled into a book entitled, “The Heart of Epiphany.” Books were distributed to students, families, faculty, and staff as mementos of this historic occasion. This in-house publication is currently in a small conference room aptly named the Epiphany Room at Mid-Pacific elementary. (Appendix E)
I also understood the importance of ritual — ceremonial actions to provide coherence to anxiety-inducing conditions, such as the merger an entire school community was experiencing. In the last days of the school year before the closure of the Epiphany campus in May 2004, I addressed the students for the last time in the Church of the Epiphany, and asked them to take their final walk through the entire campus in silence, touching the walls of the buildings and classrooms, and breathing in the environment that had functioned not only as a school setting but also as a place that supported their intellectual and emotional security and sense of well-being. The children followed me in respectful silence, along with the faculty and staff, touching the walls and doors, each of us lost in our own memories of growing in this beloved environment. We concluded the walk in the Parish Hall where the Mid-Pacific Institute president and vice-president welcomed the students for the first time as Mid-Pacific Institute students, assuring them of their continued learning on a different campus and the increased opportunities for learning with middle school and high school students.

*Assimilation: Facing Resistance*

As noted by the board member who perceived the delay on the Epiphany campus due to the construction of the new school as beneficial to the transition process, the elementary faculty had more time — to an extent — to mentally and emotionally prepare for the inevitable cultural changes. There were enough distractions with setting up their new classrooms, adjusting to a much more spacious environment, and adapting to a larger class size of eighteen students (compared with class sizes of as few as nine students and as many as fifteen). Fourteen new
faculty were added, nearly doubling the number of faculty because of the new preschool and an increase in the number of classrooms from nine to fourteen.

My entire focus the first year on the MPI campus was on the curricular and instructional aspects of the program, an attempt to anchor ourselves in the beliefs and practices that had been outlined in the Memorandum of Understanding I had sent to the school president. Requiring teachers to write weekly blogs posted on the school website was an effective method for communicating the unique characteristics of the preschool and elementary program. An intranet, established exclusively for each principal and which only their teachers could access with a password, allowed me to communicate directly with my faculty. Whether intended or not, I was grateful the preschool and elementary faculty was permitted to continue the same inquiry-based curriculum and approaches developed and implemented several years before the merger. Parents applying their children through admissions were seeking the same program that had been developed at Epiphany. There were only two occasions for the faculty of grade-level divisions to gather together — the faculty convocation at the beginning of the school year and the faculty awards event at the closing of the school year. An MPI high school faculty member recalled —

_I think there was a hands-off unspoken edict from somewhere up above where I felt we had been told not to do anything to interfere with the way that elementary school did its business . . . and that was interpreted at some level of ‘Don’t try to find out what they’re doing. Don’t even - don’t - just leave them_
alone. Hands off. Don’t do anything that might come down and 
come across as dictating how things happen. (high school faculty)

Interactions among faculty were rare, unless a middle or high school faculty had a child enrolled in the preschool or elementary. Even the physical location of the elementary campus, set aside on the upper end of the campus, separated by a security fence and gate, created a sense of isolation from the rest of the school. Aside from the intensive, exhaustive efforts over a three-week period to organize classrooms and offices while preparing for the opening of the school year, we still felt like Epiphany at the core, though bearing a different name. Left to evolve on our own, we appreciated the fact that MPI did not attempt to intervene, dominate, or impose, which often happens when an organization is acquired by a larger organization, particularly in an acquisition. While the benefits of isolation appeared to strengthen our resolve to establish the preschool and elementary in order to preserve “the heart of Epiphany” — its identity — the effects stirred an emotional backlash against the newly-minted community.

**Myth-Making: Them and Us**

At first there was them and us. I didn’t even know that they had PE meetings or even know anything about their program. There was a woman who blamed me for them not getting their lockers. And it was because the elementary took the money. So she mentioned that it was my fault in a meeting. . . I just let her talk, let her share what her fears were. (elementary teacher)
When Board members from both organizations were interviewed, they acknowledged that there would be “all kinds of challenges . . . the whole issue of faculty of Epiphany coming down here and another faculty already here with their own built-in problems . . . and then you try to make them operate together. . . .“ From their vantage point as trustees, the challenges related to a merger were inevitable, matter-of-fact, and so they appropriately left the management issues to school administrators — “I think you guys have dealt with that . . . I haven’t heard any problems . . .” But as the teacher acknowledged in the previous quote, the isolation of the elementary led to myth-making about the merger and misaligned notions of the impact on the middle school and high school, resulting in emotions of fear, loss, and jealousy. Even former elementary staff members were sensitive to the tension just below the thin surface of the faculty and staff’s veiled professional demeanor —

*I began to sense that the culture in the way people worked with each other was different. It didn’t seem as supportive. There was a lot of talk behind people’s back, and that was just not the culture that the elementary faculty and staff lived by. Our leadership would get us together on a regular basis and we should share. So I was cautious in what I said and just kept aware of areas that might need my support, again to remind myself . . . to stay in what I knew professionally was the way to go.* (elementary staff)

One myth related to the construction of the preschool/elementary buildings as having siphoned funds from the entire operational program, such as by installing interactive white
boards in the elementary classrooms rather than in middle or high school classrooms and not being able to install much-needed lockers for students in the high school physical education facilities. As discussed earlier in this paper, the construction of the elementary was necessary due to severe structural problems with the former dormitory facility, which had originally been intended to be occupied by the elementary school. Mid-Pacific Institute committed to use of government-issued special purpose revenue bonds, separate from the school’s existing funding resources, to pay for the construction of the new school. The Smartboard technology in the elementary came from a parent donor whose child was in the elementary school. There were likely many other underground misconceptions about the elementary school as the primary reason for the unmet needs in other areas of Mid-Pacific, even though the emergence of the new elementary in new facilities generated interest from the general public, including the attention of prospective donors.

Other misconceptions and innuendo that circulated among faculty was a perception of the elementary program as lacking academic rigor associated with challenging quantities of homework and assignments, a traditional evaluation system, and traditional teaching methods, for example, didactic delivery, teacher-directed lessons — There was definitely a feeling they didn’t really want us here and didn’t believe in the way we taught (elementary teacher). The absence of any meaningful curricular or instructional exchange among the entire preschool through high school faculty contributed to mounting misjudgments on both sides. At the time, faculty schoolwide was not ready to engage in discussion about their practice; collegial relationships had not been established. They were still having trouble with names and faces, and
the elementary was still adjusting to the location of buildings and offices on the 43-acre campus. Instead of forcing the issue, communication strategies were implemented to build robust support and understanding from our own parents, including several who were faculty in the middle school and high school. I encouraged the preschool and elementary faculty to be more vocal about their practices through their weekly blogs, an effective platform for explaining their classroom approaches to parents, their immediate audience, and to the broader community. I suggested that teachers include samples of student work in their blogs for public examination. Parent-teacher-student conferences scheduled twice each year were more formal opportunities for face-to-face interaction with parents to explain the documentation of learning in progress organized in students’ portfolios. We continued to invite parents to students’ inquiry presentations, such as demonstrations of learning or exhibitions.

Periodically, discussions about the disparity in philosophy and teaching practices from elementary through high school surfaced at the elementary faculty meetings. Faced with “charges” about the elementary program and pressured to change their practices, the faculty confronted new challenges. As Epiphany faculty, the goal had always been to provide a curricular framework in which to provide the best research-based instructional practices so that students exiting from sixth grade would be able to adapt to any school program. Now that we had become Mid-Pacific Institute and our elementary students would be matriculating to middle school and eventually high school, the faculty began to discuss how best to ensure that we were supporting the success of exiting high school students to colleges and universities: It makes conversation necessary more so than just the transition from middle to high school. It is a
question of what we believe is important about the kids who leave here in 12th grade (elementary teacher).

In an effort to assimilate into Mid-Pacific, the faculty re-examined their core beliefs about teaching and learning. I became increasingly aware that the lower school faculty hoped to integrate with their colleagues and to work in earnest to become one school in spirit and action rather than in name only. Elementary faculty were feeling like the “adopted child” or “step-child” in the marriage of Mid-Pacific and Epiphany. The possibility of being completely dominated by Mid-Pacific and having to abandon their practices posed a viable threat to the elementary. Preschool and elementary faculty retreats at the beginning of each academic year addressed this issue of matriculation and our essential beliefs about learning.

*Our belief that kids learn better when they’re constructing their own knowledge is really important and fundamental though not the easiest way to teach. So it’s important to always keep reminding ourselves and coming back to that belief because when you start talking about getting kids prepared and having them be able to do things in 6th grade, it’s a lot easier to give them the answers.* (elementary teacher)

I was gratified that the faculty returned again and again to the philosophical underpinnings of their practice yet were willing to make accommodations, such as being more intentional in the teaching of writing conventions (a criticism by middle school faculty), and investigating a new math curriculum that might better support elementary students’ transition to middle school.
mathematics. Non-negotiables would continue to emphasize the nature of learning and how children learn, the assessment of learning in the service of learning, inquiry-based approaches, and the emotional intelligence of learners.

Frequent comparisons to the elementary school by parents and faculty also contributed to sibling rivalry among the teachers. A middle school teacher revealed —

“You can look at the elementary school and feel like — I wish we were more unified the way the elementary appears. I don’t feel like our middle school or even our high school has quite the same unity, and I think it’s because of a shared philosophy within the elementary that the middle school and high school are still struggling to either incorporate or develop. When I look at the elementary, you’re very comfortable with your philosophy. And even if people don’t agree with it, this is what you believe and it adds strength to your faculty and even to your students, whether people like it or not. . . . Quite honestly, maybe a little bit of jealousy because you had this amazing core of people who work together and create together and that’s what everybody wants to do and maybe it was hard for people to see that.” (middle school administrator)

Another MPI staff member construed resistance to changing our educational stance, classroom practices, and cultural practices as disrespectful of the acquiring school’s position:
I think the incoming school has to let go a bit of that because now you’re a part of us. So there are compromises and give-and-take. It’s not easy to give up some of those things, especially on your part, I think. For us it’s like we’re not giving up a whole lot, but come on guys, we’re the existing school. (alumnus, staff)

“But come on guys, we’re the existing school” — the audible exasperation in his last line was indicative of some faculty and staff attitudes toward the elementary school. In the merging of schools, must the school being acquired abandon its beliefs and practices, allowing the acquiring school to dominate? Often in mergers, acquiring companies force cultural change by eliminating the leadership from the acquired company, then replacing leadership with its own people. Defying patterns of acquisition, Mid-Pacific not only retained all employees and leadership of the acquired school, but also allowed the elementary to evolve and strengthen its beliefs and practices. The fact that several faculty and staff of the existing school did not approve of the elementary’s independence and development in isolation, even though school leadership enabled it, demonstrated that resistance to organizational change was indicative of human nature and the universal “commitment to stasis . . . [our] deep loyalty to the familiar” (Mitchell, 1988, p. 273).

During the early transition years of the merger, 2004-2006, I was so consumed in efforts to develop a progressive preschool program, the first of its approach in Hawai‘i, and situating the elementary in its new environment, that I had forgotten that the elementary parents might have also been experiencing their own transition challenges. Prior to Epiphany becoming Mid-Pacific
Institute, I invited Dr. Rob Evans, a clinical and organizational psychologist and director of the Human Relations Service in Wellesley, Massachusetts, who had been doing consultancy work with the Hawai‘i Association of Independent Schools, to meet with parents concerned about the merger process. He addressed the emotional challenges inherent in change, particularly the notion of losing Epiphany’s identity and assuming a new identity as Mid-Pacific Institute. He also asserted that a significant change such as a school merger could be experienced as a genuine loss or death.

The bereavement to follow, he explained, would similarly manifest itself in Kubler-Ross’ phases of grieving: denial (false hopes about a donor bequeathing a significant amount of money to rescue Epiphany); anger (directed at the church, the vestry, the landowner, the principal, or the school board for not exhausting all efforts to retain the school and instead, planning its demise, as well as disrupting the emotional well being and educational plans of students); bargaining (searching for any possible way to make Epiphany solvent, including a plea to philanthropists); depression (manifested in many ways among the children and adults, such as sadness in having to leave a familiar space, reluctance to discuss their feelings, and feelings of disconnect with the acquiring school); and acceptance (this final phase may have only been realized years after the merger, such as in the case of a faculty interviewee who admitted that only in the past two years, from 2012, since the 2004 merger, did she feel at peace with the loss of Epiphany and accepting of her association with Mid-Pacific Institute).

One of the most instructive recommendations Dr. Evans offered was the importance of transparency in the process and consistent communication with all constituents. He described the
absence of information as a black hole, that if I was not proactive in communicating with constituents they would fill the chasm with their own fears, insecurities, perceptions, and assumptions, which would result in confusion, conflict, and the loss of integrity in leadership. Every effort was made to consistently inform faculty, parents, and students about the merger process through blogs, parent and faculty meetings, and student assemblies. Parents were especially concerned about tuition costs, which were gradually increased over a four-year period until the tuition fee they had paid to Epiphany was commensurate with Mid-Pacific’s tuition rate. Parents had few questions about the continuity of the educational program, satisfied by our assurances that the philosophy, curriculum, instruction, and assessment practices would be maintained.

In the first two years of the transition (first year as Mid-Pacific while on the Kaimukī campus and first year on the Mānoa campus, the year of isolation), the elementary parent organization continued to function as they had at Epiphany without limitation. Under the ʻOhana leadership (similar to a parent-teacher organization), committees were formed to organize the annual welcome picnic at the beginning of the school year and all the usual holiday activities and programs that are the fabric of the elementary school culture. Many parents were active participants in school life — frequenting the campus as classroom volunteers, attending student presentations during the school day, reading books aloud to classrooms, or planning schoolwide activities. However, their daily presence on campus was viewed as disruptive by school staff — too much traffic! double parking! parking in restricted areas! I often had meetings with the facilities and maintenance staff to advocate for the elementary activities, attempting to be
instructive rather than reactive, explaining that their foremost responsibility was to support the preschool and elementary community, which was an integral part of Mid-Pacific Institute.

The existing parent-teacher organization (PTO), by contrast, seemed less involved, less active, less visible on campus, which the elementary parents found problematic, though the middle and high school faculty felt that the high level of parent involvement in the upper school was simply not part of its school culture. Which students, the faculty argued, would like to have their parents roaming the hallways, having lunch in the cafeteria with them, or volunteering in the classroom? One elementary parent who was actively involved in the elementary, explained her reluctance to participate in the PTO —

*I purposely tried to just participate, but I never led and I still haven’t held a board position in years. I purposely didn’t do it because I didn’t want to offend anyone and how they had their board set up. It’s like you just go with it for a couple of years... I purposely stepped back and just watched.* (elementary parent)

Parent leadership in the upper school focused on their activities, such as Project Graduation or an initiative to purchase and re-sell textbooks (the elementary did not use textbooks), so PTO meetings were primarily reports about grade-level activities, to which neither the upper nor lower school parent representatives could meaningfully contribute. However, these meetings were informative for the elementary parents who learned through the experiences of other parents about the upper school culture, in which they would soon be participants.
While the elementary parent constituency experienced its own challenges when attempting to assimilate into the Mid-Pacific parent culture, what can be said of the students who were direct recipients of the merger? An alumnus who had attended Epiphany School and was a Mid-Pacific seventh grader when Epiphany merged with Mid-Pacific in 2004 described the reactions of classmates when the elementary moved to the Mānoa campus: I don’t know if confusion is the right word, but there were just uncertainties surrounding the whole merger for the students. It’s like, what is this going to mean? New faces, like little kids running around. Only during the second year on the Mānoa campus was an all-school assembly scheduled to bring preschool through high school students together under one roof in the gymnasium. The alumnus recalled the unusual separateness of the two schools even though both schools had supposedly merged —

And then I remember some people thinking that it almost felt like –
this is the first couple of years — that it was like two separate schools because a lot of the kids who were in high school weren’t even aware there were little kids on the campus. I would say during the first couple of years, there was uncertainty about what this whole merger really meant for the entire school. (alumnus)

Middle and high school students received scant information about the elementary, and likewise for the elementary about the upper school. Perhaps the same “hands-off unspoken edict” the faculty felt obligated to observe applied to the students as well? Except for the daily morning traffic onto the campus and the afternoon traffic exiting the campus when preschool and
elementary students were visible, out and about the campus, students on either end of the campus rarely interacted, left to create their own myths about the small kids and big kids they might have caught glimpses of.

*A View of Transition Challenges through the Lens of Culture*

Understanding what had transpired (or failed to transpire) during the first two years of the merger is best framed through the context of culture, defined as “a pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration, which has worked well enough to be considered valid, and therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems” (Schein, 2010, p. 18). Culture, beyond a group’s practices, traditions, climate, and operational mode (Evans, 1996, p. 41), embodies at a much deeper level the group’s basic underlying assumptions and beliefs. Schein clarifies that these basic assumptions are strongly held in a group to the degree of consensus that “results from repeated success in implementing certain beliefs and values.” Vaill, as cited in Evans (1996, p. 43) further defines culture as “a system of attitudes, actions, and artifacts that endures over time and [produces] among its members a relatively unique common psychology” (1989, p. 147). These deeply-held assumptions enable a group’s responsiveness to external threats to survival and growth and problems with internal integration (Schein, 2010, p.28).

The closure of Epiphany, after nearly seventy years of operation, signified for the Epiphany community the demise of a school culture and its beliefs, values, and assumptions about teaching and learning. The prevailing metaphor of the merger as a marriage between
equals — “two hands coming together in partnership” — was an idealized image not widely held by the middle and high school. Even the MPI president was concerned about the potential lack of support of the elementary’s principles of teaching and learning —

_The fear wasn’t about you and me. The fear was about my extended family here through secondary school who were not accepting of us starting an elementary school. For them it was a matter of fear of an unknown . . . and though I worked to convince them, I worried about whether they would come together or would they kind of coalesce as a group against everything and make it difficult . . . _ (former MPI administrator)

The elementary’s resistance to subordination as the acquired school and resistance to the abandonment of its assumptions, beliefs, and values was manifested in the Memorandum of Understanding, issued to the MPI president. Though not formally agreed upon by the governing boards of both schools, this document of clearly-articulated assumptions about learning provided the premise under which the elementary school would operate — and survive.

Though these assumptions seemed to the elementary fundamental to their raison d’être and so ingrained in practice, these basic assumptions had not been shared or discussed with the upper school prior to the merger or even during the first year the elementary became Mid-Pacific. The year of isolation on the Kaimukī and Mānoa campuses, as serendipitous as it had seemed for the elementary school to operate relatively untouched, was a year of missed opportunity to address the gaps in knowledge, which led to attitudes of mistrust across the school.
and across constituencies. According to Schein, culture serves as a “conservative force” reflecting “our human need for stability, consistency, and meaning” (1992, p. 11). However, if the cultural assumptions of the merging schools were unknown or being questioned, the internal turmoil people were experiencing would continue, diminishing any sense of stability and security.

**Middle Years of the Merger: 2006-2009**

*Skirting the Issues*

The years from 2006 through 2009 continued to address operational issues, such as shared usage of the gymnasium or auditorium, school calendar conflicts with regard to facilities and parking, establishing an elementary afterschool program, meeting preschool licensing requirements, scheduling facility maintenance, communication processes and procedures. We seemed to skirt the hard questions addressing philosophical views of education — What were the core assumptions, beliefs, and values underpinning practice? How could we re-examine and possibly change some of our cognitive structures around teaching and learning to create assumptions that would distinguish Mid-Pacific? What incremental changes could we consider schoolwide to evolve the school to its next stage of development? What insights, even if threatening to dominant thinking, could we examine in order to define our identity as a unique, profound educational culture? The questions were critical, but the faculty seemed ambivalent about entering into deep, possibly threatening conversations about the evolving identity of Mid-Pacific as a merged school. Schein’s concept of “unfreezing” best describes the stage of development of the newly-merged school — the tendency of human nature to cling to the
familiar, to maintain homeostasis to avoid making people feel anxious (Evans, 1996, 56). It would be fair to generalize that school leadership, faculty, staff, and parents were still trying to grasp the significance of the reality — being a preschool through high school, the presence of an additional 300 people on campus all at once, progressive programs in the preschool and elementary, and even the increase in campus traffic. We were still in a suspended state of anxiety. The relative newness of the merged Mid-Pacific Institute felt like new shoes — attractive and appealing but stiff and uncomfortable. We had yet many more miles to trod as a merged school before “unfreezing” and working toward thinking and acting as one school.

The Challenges of Membership in a Subculture

One of the primary experiences for which the lower school faculty was unprepared was their participation in the Mid-Pacific Teachers Association (MPTA), affiliated with National Labor Relations Board. The faculty association bears the characteristics of a subculture, Schein’s analysis of a group operating within the larger context of the organizational culture and sharing many of the assumptions of the total organization, but also holding other assumptions reflecting their functional tasks (Schein, 2010, p. 55). MPTA began in the mid-1970s, a response to faculty employment conditions and school leadership so that a bargaining group was organized to represent the collective voice of teachers. According to the association by-laws, MPTA was organized to 1) work for the welfare of children and the improvement of instruction; 2) promote a continuing program to improve salaries and benefits and working conditions through formal negotiations with Mid-Pacific Institute as employee and all teaching faculty; 3) speak with a common voice on matters pertaining to the teaching profession; 4) represent teachers in dealing
with the employer on grievances and disputes; and 5) provide an ongoing communication system between association members and the school administration (1975, MPTA Constitution and Bylaws.) To this day, these beliefs and values about the role and function of the faculty association are not wholly shared beliefs and values of the entire faculty. Less than thirty percent of the faculty pay monthly dues, and only these faculty are permitted to vote on any contract-related issues. These espoused beliefs and values reflect a desired behavior but have not been necessarily reflected in observed behavior during negotiation periods or in communication with school leadership or membership (Argyis and Schon, 1978, 1996, as cited in Schein, 2010, p. 27).

This cultural practice of participating in a faculty association was foreign to most of the elementary faculty whose teaching experiences had been in independent schools. I was particularly challenged by the notion of my limitations to communicate directly with faculty on issues of their employment, as was the expectation when I was head of Epiphany School. I believed I had an open, honest relationship with the faculty and staff, and my faculty felt likewise, as one elementary teacher shared —

*I don’t feel the union has a place in the school if the trust is there and the relationships of working together as a school is there. If it’s a collaborative community, you don’t need a union. You don’t need somebody to speak for you or to fight for you. I think it makes it harder sometimes.* (elementary faculty)
Although this teacher’s sentiment was widely held among the lower school faculty who expressed their opinions to me directly and with colleagues, there appeared to be no recourse but adapt to the subculture and hope to wield influence through strategic, active participation in the association. To this end, the lower faculty became dues-paying members in order to be able to vote and voice their opinions.

The first elementary representative measured her comments with the Association leadership, appealing to rational judgment and reminding colleagues about the call to professionalism in the service of students first. Eventually, she declined to participate as the elementary representative, emotionally worn by the demands on her time and internal conflicts about the nature of the association in relation to the mission of the school. Another elementary teacher assumed the role as association representative, more supportive of the association’s political agenda.

As I had learned only years after the merger, the preschool and elementary faculty should have been provided information about the MPTA, its purposes and functions, and should have been given an opportunity to vote on whether they wanted to be represented in the association. Instead, the preschool and elementary faculty were subsumed into the association. Employment provisions, set by the contract, affect all faculty. Encounters with the union usually occur during contract negotiations or quarterly consultations with the school principals. Representatives from each of the grade-level divisions, chosen by the faculty, sit at the table with the principals and Chief Financial Officer during negotiations and with principals only at quarterly consultations.
Since becoming part of Mid-Pacific Institute, I have participated in three contract negotiations (contracts had been negotiated for 3-year periods). The first negotiation experience in 2007 was confrontational over specific contractual language regarding the professional expectations of teachers. After several meetings, mutual agreement was reached, with faculty receiving a 3% salary increase and debatable language about teacher expectations retained in the contract.

The second contract negotiation period three years later in 2010 was volatile, requiring after several heated discussions an external third party to negotiate on behalf of school leadership. At a surface level, the highly contested issue concerned the number of work hours defining a regular full-time teacher. Since the merger in 2004, the preschool and elementary had been working 38.5 hours, compared to 35 hours for middle and high school faculty. The additional hours were attributed to recess supervision during the school day, a common responsibility in the profession among teachers of younger students. Association representatives of the upper school claimed that I was in violation of the contract, rather than accommodate the different responsibilities of preschool and elementary teachers. A high school representative spoke disparagingly, accusing me of violating the contract. The principals and CFO agreed that the principals should not be subjected to disrespectful treatment or enter into negotiations of this nature with teachers we must evaluate.

From the time meetings with MPTA leadership began, there was a pervasive undercurrent of tension at MPI, and more so at the elementary. An elementary teacher expressed concerns about the association’s purpose:
I think the biggest challenge is the union because everyone’s looking for equity. I think what they’re looking for is fairness, but they’re saying everything has to be equal. But it’s not possible, and with that mentality, I think it’s hard to keep things moving, like it just gets in the way of things. The focus gets shifted from the students. How do we teach and learn? How do we focus on ourselves as professionals when they’re focused on "Well, how come you work these many hours (to elementary) and I work these many hours (high school)?" (elementary faculty)

My faculty disapproved of their colleague who they felt did not represent their wishes. A few of my teachers courageously spoke directly to association leadership in defense of their work practices and willingness to continue a 38.5 hour week regardless.

The association’s response was restrained, repeating the party line that all teachers must work 35.0 hours each week. It was very clear to me during this contentious period how important my reactions and behavior would be perceived by my faculty. I continued to respond respectfully to this teacher, continued observations in the classroom, and interacted cordially with the teacher in faculty meetings. I placed my professional relationship with the teacher ahead of my own personal feelings, mindful of the influence of my position in the school and influence of my behavior in terms of my faculty’s relationship with their association representative.

Due to the heightened emotions schoolwide, a professional negotiator and MPI’s Chief Financial Officer represented the Employer, and the faculty association was represented by their
legal counsel. Negotiations continued through the summer until a final agreement was reached. Though there were several issues addressed in the negotiation, the particular issue about the preschool/elementary faculty’s 38.5-hour work week was reduced 2.5 hours by altering the time teachers were required to report for work and when their work day officially ended. The additional one-hour faculty meeting was approved through a Memorandum of Agreement and has been included in the existing contract.

The experience remains with me because the faculty union imposed a threat to the nature of the preschool/elementary program. The central issue, as I had perceived, was not about work hours. The real challenge for me was the faculty association’s inability to truly acknowledge the shared goals and mission of the merged school and the work ethic of the elementary faculty. Insisting on a 35.0-hour work week would have jeopardized the safety of all students (without proper supervision) and disrupted the work schedules of their parents and families (reducing hours of the school day). Moreover, the situation created disequilibrium in the professional relationships among the faculty and their well-being as a cohesive group. A perceived attitude of mistrust between the elementary and association leadership seemed to take hold. Unfortunately, the attitudes and behavior of the association representatives reinforced my perception of the association as an impediment to school progress.

The most recent 2013 contract negotiations were conducted under different conditions. The school, as employer, was represented by the new school president, principals, and CFO, with the president assuming the lead role as facilitator. His extensive experience in union negotiations while superintendent of a public school district contributed to a markedly improved negotiations
outcome. At the initial meeting, the president iterated the mission and vision of the school, asking each participant to identify the most important aspects of the mission and vision for himself or herself, and then for the constituents who would benefit from contract negotiations. Beginning with the goal in mind set a positive and constructive atmosphere, which was consistently referenced at every meeting. All agreed to respect the confidential and sensitive nature of information discussed. The notion of “one team” rather than opposing sides led to the acronym FACT — Faculty and Administration Collaboration Team. At the conclusion of each meeting, FACT discussed the salient points to be communicated, and a faculty representative emailed all faculty rather than dues-paying members only. The impact of leadership on the formation of a groups culture will be discussed in the next chapter, but suffice it to say that Mid-Pacific’s new leadership, tested in the context of what had typically been a strained contractual negotiations process, significantly reduced faculty anxiety, or as Schein describes, the beginning of “unfreezing.”

While the arrival of the elementary and opening of the preschool generated a wave of disruptions at Mid-Pacific Institute, the middle school and high school were undergoing changes in leadership, and with new leadership, another level of anxiety. A new principal was chosen for the middle school in 2006, followed by a new high school principal in 2008. Both exiting principals took new leadership positions in other independent schools in Hawai‘i. The changes in leadership within two years created organizational struggles for faculty in these divisions, each leader bringing his and her own philosophical values of education to Mid-Pacific. All three principals, relative newcomers to Mid-Pacific (2004, 2007, 2008 respectively), readily struck an
alliance, providing collegial support and helping one another navigate the cultural waters, while focusing on our respective areas of management.

**The Merger Experience from the Student and Parent Perspective**

The challenges in a school merger were most demonstrative in the experiences of students matriculating from the elementary into middle school. Generally, elementary students complained about the quantity of homework, the differences in instructional delivery, and the emphasis on academic performance in ways that seemed punitive. While it is understandable that there would be changes in terms of homework expectations for students transitioning from one elementary classroom teacher to five or more in the middle school in any K-12 school, the elementary faculty and parents were hard-pressed for a rationale to support excessive amounts of homework other than “just the way it is.” Elementary parents were concerned by the seeming lack of continuity in philosophy about learning between the elementary and middle school and the differences in teaching, from guided instruction, small group work, and inquiry projects to lectures, daily quizzes, and weekly tests. According to a middle school teacher —

*These kids [5th to 6th graders] weren’t accustomed to getting grades, things like that. And I think that affected the 6th grade teachers the most because now they were in charge of a transition that they never had before, especially if you’re a student coming from an outside school, then you just said, “Well, I this is how they do it here in Mid-Pacific.” But now, you’re already at Mid-Pacific, so you can’t say that. There’s need for continuity, and initially for*
the 6th grade teachers, it was hard because it was just different from the college-preparatory traditional learning that they were accustomed to. (middle school faculty)

Middle school faculty complained about the elementary students’ lack of experience with time management, test taking, and study skills, and their inefficiencies with mathematical computation and English grammar skills. However, the homework concern that seemed most contentious for parents and students was indicative of deeper issues regarding a philosophy of learning in the middle school, previously discussed in an earlier chapter.

The middle school concept was relatively new in Mid-Pacific, only formally instituted in 1997. The first middle school principal was challenged to build a dedicated middle school faculty by pulling from the high school faculty and securing existing space expressly for middle school students. The second middle school principal focused on defining a middle school philosophy based on the notion of “teaming” as the elementary school was just arriving at Mid-Pacific. A senior faculty member speculated that the identity of the middle school was yet undefined, and with the Epiphany merger there was pressure to interface not only with the high school, but also with the elementary as they received students into middle school.

I think that caused some challenges about what the identity was for the middle school, particularly on how we fit in to that -- how they work with kids, what they believed about learning, what they were responsible for in terms of the handoff when kids came to them, so that there was a natural transition. It wasn’t pressure or difficulty
for the kids to adapt to a new culture of learning or how teachers expected students to position themselves in a classroom. (high school faculty)

The middle years of the merger overlay the early growth of the middle school, compounding issues about faculty resistance to change and challenges to the existing school culture. Teachers’ internal turmoil about their teaching mindset, experiences, and knowledge were contested by the elementary parents’ expectations for their children’s learning continuity on philosophical and functional levels. Even though the fifth and sixth grade faculty met quarterly to discuss social activities to ease the transition from elementary to middle school, differences in instructional practice or curricular decision-making were regarded as status quo and respectfully non-debatable.

**Shaping School Identity: The Vision Statement**

In 2008, an important event that would determine Mid-Pacific Institute’s future occurred — the creation of MPI’s vision statement. This joint action between the school administrators and the board of trustees became the shared basis for articulating the school’s beliefs and values. During a summer retreat, the administrative team — president, vice-president, principals, and chief financial officer — drafted a vision statement for Mid-Pacific, which was extensively discussed at successive meetings among the Board of Trustees. The original vision statement — Mid-Pacific Institute International School of Science and the Arts: enriching learning through technology — was limited in its scope, focused on science and the arts, and on technology as the means to achieve learning. A state-of-the-art technology center configured to support
collaboration and innovation had been built in 2002; the Mid-Pacific Institute School of the Arts, a certificate program, was already in its seventeenth year. The international dimension of the school program (International Baccalaureate) had been developed since 1986, when Mid-Pacific began admitting international students. Throughout the year, all board committees discussed drafts of the vision statement, weighing its implications and the direction they envisaged for Mid-Pacific. The final iteration of the vision statement, formally approved by the board of trustees, was shared with all constituencies: Mid-Pacific Institute will prepare students to make a difference in the world by embracing change with creativity, collaboration, critical thought, and global awareness, guided by moral and ethical values.

The vision was bold. Empowering students with the belief and attitude that they not only have the capacity but also the responsibility to influence, take action, advocate, raise awareness, and innovate was a lofty order. All of these actions undertaken through learning the 21st century skills of collaboration, critical thinking, creativity, and global awareness specified the fundamental nature of teaching and learning required of the faculty. The notion of actions and decisions guided by moral and ethical values acknowledged the challenges of our human nature. However, the most critical phrase in the vision statement — “embracing change” — was not an invitation to change but a challenge to welcome the inevitable with full awareness and intentionality. Most importantly — and this was the crux of the challenge for a school with a history of more than one hundred years — a change in the school culture was critical in order to best prepare students not for graduation, but for life. One of Schein’s principles of change describes cultural change as “always transformative change that requires a period of unlearning.
that is psychologically painful” (Schein, 2010, p. 312). The vision statement set the wheels of transformation in place, but only until these beliefs and values would be embodied, adopted and implemented by the faculty and staff, these beliefs and values could only claim to be espoused, that is, aspired to as opposed to “absolute integrity” in practice (Schon, 2010, p. 40).

**Transformative Years: 2010-2014**

*The Crux of Transformation*

When asked how the merger of Epiphany and Mid-Pacific Institute affected Mid-Pacific, interviewees discussed the fact that the elementary program provided models and demonstrations of “best practice” the middle and high school faculty had read about but had not attempted or implemented effectively. An administrator in Mid-Pacific’s long-established and renowned School of the Arts offered this insight:

> I feel like the teaching philosophy [Reggio Emilia in preschool] that’s all about 21st century education — project-based learning — is what eventually became *MPX. I think that’s what lit the fire for the school, not just because of the philosophy, but having a program that actually taught that way here. I’m not saying that everyone teaches that way throughout the school, but I think that part of the reason we were able to move towards project-based learning was seeing what was happening specifically not only in the preschool, but also over the past few years of inquiry integration in the rest of the curriculum at the elementary. (high school faculty)
*Note: MPX, Mid-Pacific eXploratory, is now in its third year as an integrated science, technology, engineering, arts, and mathematics (S.T.E.A.M.) course for high school freshmen and sophomores, taught completely through project-based learning.

The director of Mid-Pacific Exploratory, co-designer of the school’s state-of-the-art technology center and a well-experienced science teacher, reflected on the elementary school influencing Mid-Pacific’s programmatic changes:

I remember in the early part of our work, trying to look at re-thinking lesson design and the idea of an essential question and 10 years ago in the high school, that being a really difficult conversation. People not knowing why we would set that up as a context for investigation in a classroom and yet, the elementary was doing it every day and their work about why are we doing this and what was driving this learning. I think that they had back-handedly influenced the way teachers in the high school started to think about the work of the school as a whole. (high school faculty)

The former president of Mid-Pacific Institute, in a separate interview, echoed similar sentiments about the elementary school’s teaching practices —

The curriculum, instruction, assessment have all been things that I felt could’ve had a positive impact on what’s happening in the upper levels. They needed to be introduced to it. They needed to
see it on a daily basis. They needed to know that you had the strength of conviction about what you’re doing and that this would work and has been working. (former MPI administrator)

Herein lies the crux of transformation — the ability of an organization to assess its strengths and weaknesses to modify its cultural assumptions and practices not only for survival, but moreover, for effective functioning. When members collectively achieve insight, they can redefine their educational assumptions, abandon assumptions that are barriers by subordinating these to higher-order assumptions, and open the channel to change (Schein, 2010, p. 277). The presence of the elementary provided consistent and continuous demonstrations that helped to shift faculty assumptions of a teacher-centric to student-centric model of teaching and learning. However, there were already a number of middle and high school faculty searching for ways to operationalize their insights about effective methods of teaching. Ten or more years prior to the Epiphany merger, Mid-Pacific Institute had already developed their School of the Arts based on the assumption that the most effective learning is best implemented when faculty experts adopt the stance as guides and coaches who provide relevant and constructive feedback to a wide range of student-artists in theatre, dance, singing, instrumentation, digital technology, and visual arts. However, this underlying assumption about teaching and the nature of learning did not transfer to the academic core content areas. The math-science-media technology center was based on the concept of collaborative, enactive learning with spacious, aesthetic areas supporting interactive learning. The faculty offices were designed to showcase faculty in collaboration through large glass windows. Ironically, cubicles were built, a graphic statement of the collaboration lacking
among some of the faculty in core content areas. The point is that there existed in individuals and small groups of teachers across Mid-Pacific Institute a desire to change school culture from status quo to a powerful school culture wherein educators have an unwavering belief in the ability of all their students to achieve success, and educators create policies and procedures and adopt practices that support their belief in the ability of every student (Cromwell, 2002, p. 15).

The elementary presence seemed to have provided a catalyst for widespread change and affirmation for those poised to change. Preschool and elementary faculty extended open invitations to the school community to observe their classrooms. One faculty member speculated that his involvement as the parent of two Mid-Pacific elementary students provided the greatest insights, and he suspected it was the same experience for other MPI employees with children in the preschool and elementary —

*The biggest impact surprisingly to me was any of the high school faculty with kids in the elementary were telling the stories of what was happening in the elementary better than at some level the organization was facilitating awareness of what was happening. . . . There was an education process for MPI employees who were more traditional and wondering why the elementary looked the way it did. And there were other folks who were seeing their own kids, like myself with my own two kids, something come out of their kids that was strong, and after interacting with the*
elementary faculty getting a better sense of how they work with

students. (high school faculty)

Though the lower school’s educational beliefs and values had already been operationalized for nearly twenty years prior to the merger with Mid-Pacific, I understood that it would be strategically advantageous to consider ways for the school faculty to learn together how to shift paradigms, as opposed to the preschool and elementary being treated deferentially. Remember that the preschool and elementary were not-so-welcome immigrants to the Mid-Pacific domain.

Yet new, spacious facilities were designed for them, much to the chagrin of faculty and staff who worked in aging, well-worn buildings. Add to this the perception that the students and faculty were generally a happy community with parents who were actively involved in the cultural celebrations of elementary life, compared to a more serious sense of parent involvement as students matriculated to high school, for example, academic and college counseling.

Highlighting the differences among the school levels would only deepen the wedge and promote divisiveness.

Then Serendipity Happened . . .

In 2009, about the same time the MPI board of trustees and administration had been undergoing a process of defining the school’s vision statement, the Hawai‘i Association of Independent Schools (HAIS) announced an initiative called Schools of the Future (SOTF). HAIS partnered with the Hawai‘i Community Foundation (HCF), a non-profit foundation that brings together philanthropic funders with non-profit, community, business, and government leaders to maximize the impact of grants to support large-scale initiatives addressing a range of critical
social issues in Hawai‘i. The five-year capacity-building initiative to address the ramifications of a rapidly changing global future and its impact on education was an invitation to all Hawai‘i independent schools to rise to the challenge of re-thinking their school environments and teaching strategies to better prepare Hawai‘i students for the future. The initiative further specified the promotion of the teaching and learning of 21st-century skills using digital technology to support the teaching and learning of those skills.

In support of the goals of the Schools of the Future initiative, the Hawai‘i Community Foundation (HCF) provided five million dollars distributed over a five-year period to schools meeting the grant criteria. The E.E. Black Trust was the charitable funding source, managed by HCF, supporting the initiative. In order to receive funding, schools were required to submit a detailed plan to include: specific goals, descriptions of the student work to be developed as evidence of learning, a description of the envisioned classroom environment, the teacher’s role, use of technology to support teaching and learning, the extent of stakeholders’ involvement, a description of the infrastructure necessary to support goals, a rationale for financial support directly related to the goals, a timeframe for implementation, and means to assess the effectiveness of the strategies and action undertaken. A semi-annual report was required to provide progress updates. A final narrative report, including financial disbursements and an assessment with documentation, was submitted, along with a new grant proposal for each successive year. Hawai‘i Community Foundation hired external evaluators to visit schools in the third and fourth years of the initiative. A teacher and student survey and focus group meetings with students and teachers was conducted in the third year. The grant protocols and follow-up
were a rigorous process, requiring support from an MPI coordinator and the elementary, middle, and high school principals to meet several times each year to focus expressly on the Schools of the Future initiative. Mid-Pacific Institute, one of eighteen qualifying schools, was awarded a renewable amount of seventy-five thousand dollars, the full amount possible each of the five years.

**Schools of the Future as change initiative**

SOTF provided the impetus for launching a five-year effort to implement the school’s new vision “to prepare students to make a difference in the world by embracing change with creativity, collaboration, critical thought, and global awareness, guided by moral and ethical values.” Moreover, the initiative was a change agent and change process for all grade-level divisions of Mid-Pacific Institute, enabling the school to re-define its identity and transform its culture by re-examining its basic assumptions and beliefs about teaching and learning and embracing the implications of educational change. In addition to financial support, Hawaiʻi Community Foundation and the Hawaiʻi Association of Independent Schools scheduled quarterly full-day sessions for all SOTF schools — the Community of Learners — to share stories of their challenges and achievements and learn from various presenters how to effect teacher change, such as the use of protocols, assess student work, respond to teacher resistance, and garner support from a school community.

One of the most strategic decisions regarding the initiative concerned leadership. The Mid-Pacific principals agreed to take the lead for their respective divisions and to represent Mid-Pacific at the Community of Learners’ quarterly meetings rather than appoint faculty
representatives. Decision making about budget, scheduling, and professional development could be expedited as needed, and principals would confer directly with their teachers and appoint faculty leaders for specific activities. The principals created an infrastructure for change, cognizant of the range of faculty assumptions about teaching and learning, from the “believers” (educators who believe in the school’s core beliefs and values that create a healthy school culture) to the “tweeners” (educators new to the school culture who try to learn the expectations of the school culture and end up in the middle) to the “survivors” (educators so overwhelmed by demands of the professions that they suffer from depression and merely survive from day to day) to the “fundamentalists” (educators not only opposed to change but organize to resist change initiatives) (Muhammad, 2009, p. 29). This decision about the role of SOTF leadership at Mid-Pacific proved to be an effective strategy because the school was able to meet most of its goals, and for those that it did not, was able to modify them for successive years in the SOTF initiative without undergoing a potentially long period of consensus-building just to determine school goals.

Mid-Pacific’s collective schoolwide goals, explained in a 2008 executive summary to the Hawai‘i Community Foundation, were to —

- enhance and transform our school-wide curriculum, instructional practice, and assessment methods in order to achieve our new vision. In 5 years, students at Mid-Pacific will experience project-based learning that investigates and offers solutions to actual local, national, and international issues; participate in various learning,
multi-grade teams where collaboration is essential to the learning process; think critically about issues from inter-disciplinary and global perspectives; and create portfolios or other forms of in-depth assessments documenting their learning. The faculty of the preschool, elementary, middle, and high schools will collaborate on curriculum development, instructional practice, and assessment of student learning; engage in interdisciplinary team teaching; and include the community-at-large as viable resources and partners in their students’ learning.

Considering the challenges the school had experienced with instituting the middle school, changes in school leadership, the merger of Epiphany and Mid-Pacific, and all the related complexities related to the merger as discussed in previous chapters, these goals would certainly challenge the school community’s basic assumptions and beliefs about teaching and learning, yet potentially serve to re-define MPI’s culture and direction as aspired to in its new vision. Change, according to Schlechty (1990), is no simple task. Social structures are embedded in systems of meaning, value, belief, and knowledge; such systems comprise the culture of an organization. To change an organization’s structure, therefore, one must attend not only to rules, roles, and relationships but to systems of beliefs, values, and knowledge as well. . . . Cultural change, increasingly seen not
just as vital to certain programmatic changes in schools but as a goal in its own right, is an extraordinarily complex undertaking. . . .

(p. xvi-xvii)

The framework for systemic change would be two-pronged: 1) schoolwide professional development to create opportunities for faculty to engage in face-to-face discussions directly addressing our assumptions, beliefs, and values of teaching and learning, and 2) providing professional development specific to the needs of each school division. These macro- and micro-interventions would serve the purpose of coming to a broad understanding of the philosophical underpinnings of the school vision and determining how to best operationalize this vision. Submitting the grant proposal seemed the necessary next step in the evolution of Mid-Pacific, serendipitously hand-in-hand with a vision for what one school could become — “an extraordinarily complex undertaking” indeed.

The principals made an important strategic decision with regard to professional development the first year of the initiative, one which is intended to continue beyond the SOTF initiative. While opportunities for faculty to attend workshops and conferences would continue to be available, professional development would involve schoolwide faculty participation— preschool through high school altogether — on two full days in the school year. Ordinarily, each of the school divisions or high school departments planned their professional development foci in isolation. This cultural shift in professional development practice was unprecedented at Mid-Pacific Institute, bringing together for the first time in the history of the school all faculty members with the intention of learning, thinking, and talking together about our underlying
educational beliefs and assumptions. It was also the first time since the merger in 2004 that the preschool and elementary faculty actually sat beside their middle and high school colleagues in this professional context!

Although Mid-Pacific Institute had recently become a merged school consisting of four distinct levels—preschool, elementary, middle, and high school—each of the principals, myself included, was entirely focused on addressing the needs of our respective divisions. When the SOTF initiative began in 2009, the high school principal had only been in place since 2008, with the middle school principal beginning in 2007, and myself at Mid-Pacific since 2004. Each of us arrived to our roles rather myopic, focused on our immediate charge, fully aware of where our respective schools and faculties might be situated along a continuum or evolution of “enlightened” teaching and learning, while also mindful of our “one school” goal. I had brought to Mid-Pacific an elementary school community and formed a preschool, so it seemed quite natural to maintain a fierce sense of loyalty and commitment to the faculty, students, and families in my domain, as I surmise would have also been the case for my colleague-principals. Each of us developed goals specific to the strengths and needs of our respective faculties and students, building from the current strengths of our existing programs.

For example, over the five years of the SOTF initiative, the elementary school deepened and solidified their approach to inquiry-based learning. The faculty collaborated over a two-year period on the development of an inquiry performance continua for kindergarten through second grade and grades three through five. Analysis of student work and documented observations provided the basis of performance descriptors in the continua. Working from nearly fifteen years
of experience with student portfolios documenting learning progress over time, the faculty developed an electronic portfolio process for students using iPads, while constantly re-evaluating prompts to help students reflect on their learning. The faculty also did extensive work on understanding and implementing the use of “thinking routines” across content areas, a pedagogical innovation developed in Harvard’s Project Zero.

The middle school focused their efforts on exploring alternative assessments, establishing a culture of interdisciplinary, collaborative teaming, and investigating a teaching schedule that would best support student learning. Prompted by developments across Mid-Pacific to provide increasing access to technology (for example, iPods, laptops, iPads), a few middle school faculty took the lead in implementing the use of technology in their teaching, assessment of student learning, and developing more units of study using project-based learning processes. This core group in the middle school developed into faculty experts on the integration of technology. With regard to alternative assessments, more middle school teachers were engaging students in goal setting, self-evaluation processes, and keeping their own electronic portfolios for different courses. The faculty collaborated on interdisciplinary projects based on common themes, and students presented their projects at Presentations of Learning to different audiences of parents, students, faculty, and alumni.

The high school, with a more traditional learning environment, experienced more resistance to innovative practices. Nonetheless, a core team conducted extensive research on the concept of a School Within a School, based on schools visited such as High Tech High and the Met in Rhode Island. The intent was to develop a learning community where project-based
learning integrating science, technology, engineering, the arts, and mathematics (STEAM) and team-taught through a collaborative, entrepreneurial approach would operate independently in the high school. By the second year of the SOTF initiative, the School Within a School model shifted to the goal of transforming the entire high school rather than confine innovative, progressive teaching to a School Within a School. MPX, or Mid-Pacific eXploratory (the program named by the students themselves) became an educational option for entering freshmen and would serve as a model or “fishbowl” for the kinds of learning and thinking about learning hoped for in the high school. After a series of meetings with department chairpersons and faculty, the entire high school moved to a block schedule, from which the MPX program directly benefitted having longer segments of instructional time. Faculty for other courses received professional development on making effective and productive use of lengthened instructional periods, such as engaging students in collaborative projects, group discussions, integrated use of technology, and research field trips. High school departments have been meeting with their respective faculty to address curricular concerns and instructional strategies specific to their discipline.

In many ways, the program management of the three divisions seemed like an orchestration of different parts resonating a major theme, this theme being the Mid-Pacific Institute vision “to prepare students to make a difference in the world by embracing change with creativity, collaboration, critical thought, and global awareness, guided by moral and ethical values.” The faculty were skilled musicians having to learn a symphonic piece with intricate passages, harmonic and atonal, while still being able to hear the underlying themes of the school.
vision—creativity, collaboration, critical thinking, and global awareness. These multiple, interwoven strands, different yet similar for each division, would evolve a masterful composition of one school. Or so we have been aspiring to achieve.

At a systemic level, MPI’s first two years of the initiative focused on understanding “21st-century skills” and investigating educational settings that support the teaching of 21st-century skills. Early in the initiative, SOTF organizers had identified a school in San Diego where representatives of SOTF schools visited and observed innovative teaching, confident and articulate students, high-quality student work displayed throughout the school, and teachers whose passion for teaching was evident even in casual conversations. We were immediately impressed, encouraged by what could be possible for each of the eighteen schools in the SOTF cohort. I had traveled to San Diego with the SOTF cohort, hoping to observe an elementary school model with a well-developed, innovative, inquiry-based program, in order to gauge the progress we were making in our own MPI elementary. However, the elementary school affiliated with one of the high schools was disappointingly no better than most schools. Rather than invest time, energy, and resources into a quixotic search for the “ideal” elementary, my faculty and I agreed that our focus would be to strengthen our understanding of an inquiry-based curriculum and teaching approaches. Over the first two years of the SOTF initiative, the elementary teachers worked closely with consultants whose expertise in inquiry approaches broadened and deepened the faculty’s knowledge about inquiry as an assumption, mindset, and approach to learning and teaching. The middle school faculty dedicated much of their time during this two-year period of research on 21st-century skills by focusing on inter-disciplinary teaming and cross-curricular
planning to ensure that students view learning from a holistic perspective. Inspired by their visit to the San Diego high school, the high school leadership conducted several school visits in California and Hawai‘i, worked with consultants, investigated non-traditional forms of assessment, and analyzed the data to inform the genesis of a School Within A School focused on project-based and inquiry-based learning.

At the faculty convocation in August 2009, the Mid-Pacific board of trustees’ chairperson and school president informed faculty and staff about the new vision statement and Mid-Pacific’s selection from a field of over fifty independent Hawai‘i schools as a School of the Future. Each of the principals took turns explaining various aspects of the initiative, including the primary purpose of our participation, which was to enhance and transform our school-wide curriculum, instructional practice, and assessment methods. We introduced the notion of 21st-century skills, project-based learning, in-depth assessments that would take the form of portfolios, and interdisciplinary and global perspectives. The Believers and Tweeners might have applauded enthusiastically, while the Survivors and Fundamentalists with restraint, perhaps pondering about what the implications for a school of the future would mean for themselves.

The principals were well aware that the first professional development gathering in Fall 2009 would set the tone and influence their level of confidence in future schoolwide professional development events. How could we best engage the faculty in collegial discourse that would help to alleviate the preconceived perceptions they might have harbored since the arrival of the elementary onto the Mid-Pacific campus? What would be a safe point of entry for all faculty to begin to build openness and trust? The principals decided on two areas of exploration in the
service of our school vision: working toward an understanding of 21st-century skills in the context of the learner and learning about specific technology skills for classroom teaching and learning. The principals selected several articles that would pique the faculty’s interest on re-defining academic “rigor,” the implications of teaching 21st-century skills, and the impact of technology on learning. In mixed groups across grade levels and disciplines, the faculty discussed the readings and discovered similar points of view regarding “rigor,” regardless of discipline and grade level taught. In the afternoon, teachers selected from several faculty-designed workshops focused on technology usage (for example, podcasting, wiki pages) and even more sessions on creating a collaborative classroom environment, working from an inquiry mindset, and scaffolding instruction. We ended the first all-school professional development day by viewing a video of the San Diego high school the principals and I had visited, delivering the message that becoming a school of the future was possible in the present. Anonymous written feedback from faculty was mostly positive, though there was anticipated resistance and ambivalence:

*I’m totally sold on the idea that collaboration is of the utmost importance.*

(elementary faculty)

*Overall the best team building, cohesive, explanation of why we need to change. I truly enjoyed today’s professional development.*

*This has been the best organized and useful workshop I have been*
to that was sponsored by MPI in my 17 years here. (high school faculty)

This was a fabulous session that gave us the chance to all work together; pre-school, ES, MS, and HS, which is a rare opportunity. Everyone had many distinct aspects to contribute and share and the outcome of the session was most fruitful. It was a perfect example of collaboration, and we all wish we had more opportunities to do so in the future. (middle school faculty)

While it was interesting, I don’t feel any closer to ownership of the vision of the school. Possibly more dialogue – continuation of the groups for short discussions, sharing, might help us to feel more connected as a whole, more of a community. (high school faculty)

Although I enjoyed my small discussion group, a lot of the discussion was about theory – I think I know what I want to do to be a teacher in the 21st century, but how will I know how to get there? I need a model, resource, or suggestion. (high school faculty)
A second professional development meeting in Spring 2010 sparked further disruption among the faculty. We invited Tony Wagner, Ph.D., currently serving as Expert in Residence at Harvard’s Innovation Lab and author of *Making the Grade: Reinventing America’s Schools* (2002) and *The Global Achievement Gap: Why even our best schools don’t teach the survival skills our children need — and what we can do about it* (2008) as keynote speaker. The faculty viewed two video clips of two high school classrooms, which mixed groups of teachers discussed at length for evidence of “rigor” and were asked to evaluate the teaching by assigning a letter grade and explaining their criteria for evaluation. Faculty feedback, if plotted along a continuum, indicated disparate views. The day prior to meeting with faculty, Wagner met with the Board of Trustees, small groups of parents, and interviewed students. He also took the three principals on “learning walks” to observe four classrooms from elementary through high school. Three questions focused our observations — What do we see as effective teaching? To what degree do we see student engagement? Who is in control of the learning? — which the four of us discussed at length. After a day of data collection, Wagner shared his findings, based on a small sample of meetings, interviews, and classroom observations, with all faculty.

He described a classroom in which it was evidently clear to observers what effective teaching looked like — the teacher facilitating a discussion among students who had just viewed images of marine animals in the “great garbage patch,” also described as the “Pacific garbage vortex” in the central North Pacific Ocean. Students had also viewed a video of the gyre, which contains high concentrations of plastic debris and chemical sludge that poison marine life. Students were appalled by the impact on marine life; their raw sentiments fired up a deeper
discussion, guided by the teacher, about global environmental concerns. All students were actively engaged in discussion; students were in control of their learning. Then he asked which grade level these students represented, followed by a brief dramatic pause. In the next moment when he revealed that this was a class of first and second graders and then continued to laud the unnamed teacher’s effective framing of questions, I was, of course, proud of the example held aloft representing the elementary, but extremely wary of how the middle and high school faculty construed this back-handed criticism of their teaching. I vowed that future professional development sessions isolating the elementary should be avoided. While the elementary faculty may have felt vindicated after incidents of professional reproach from colleagues since the merger, I was reminded about the wisdom of this African adage — “If you want to go fast, go alone. If you want to go far, go together.” We needed to embrace the notion that we were different learners along a continuum of professional growth.

Continuing efforts to address systemic change, professional development addressed topics relevant to the SOTF initiative. The faculty clamored for examples and processes to operationalize the vision statement. The implementation of project-based learning still seemed elusive, so in Fall 2010, a California consultant organized all faculty into twelve mixed groups whose task, through a project-based learning approach, was to create public service announcements promoting Mid-Pacific Institute using newly-issued faculty laptops. Immersion in a collaborative process among colleagues yielded a range of responses (sample responses from feedback survey completed at the end of the professional development day):
It is important to feel safe with your group in order for the ideas to flow and evolve and become something amazing beyond just one person’s effort. It’s also important to have a driving question that is meaningful to the student. (elementary teacher)

Our group was not very cooperative. In fact, I was more jealous at the other groups as they had fun and respectful groups. Ours argued and complained for the most part, and then at the end it was only one person who did the work. (high school teacher)

I understand the process better. Am feeling more positive about doing projects, though how to incorporate all necessary content when a project takes so much time? It was neat to experience things through the student’s eyes. I also liked the chance to talk to other teachers about their experiences with project-based learning. (middle school teacher)

Some people see their roles as being disrupters of this process, making negative remarks. They have to understand that this is not acceptable — they wouldn’t tolerate it from their own students! (high school teacher)
In the second and third years of the initiative, 2010 and 2011, we brought in other consultants to further deepen faculty understanding about project-based learning and the role of technology to support teaching and learning, balancing the level of expertise by including our own in-house experts across all grade levels and disciplines. One year the principals and I identified faculty from our respective levels who we knew were already implementing innovative uses of technology, project-based learning, and inquiry approaches to research projects. The teachers-teaching-teachers model was well received, so in the following year, we invited faculty volunteers to offer a menu of high-interest topics in three broad areas: collaboration and critical thinking, student voice and choice, inquiry and problem solving. Fifteen faculty from across the grade levels presented their classroom practices and challenges to audiences of mixed groups. If faculty attending sessions may not have gained direct applicable value from peer experts with regard to their teaching context, faculty-participants were generally respectful, polite, and supportive — “I realized just how important it is to appreciate the talents of my colleagues because they have so much to offer.” (middle school)

One of the most effective professional development sessions focused on the analysis of student work through tuning protocols, a structured, facilitated process of professional collaboration following a shared set of guidelines or norms that enables respectful participation and provides constructive feedback to the teacher. Different protocols are used to provide feedback to the teacher about a project, text, performance, or student work (National School Reform Faculty, n.d.). The tuning protocol originated in the Coalition of Essential Schools
Exhibitions project as a process to help teachers fine-tune their work (School Reform Initiative, n.d). The process assumes that the presenter protocol guidelines specify —

• respect for the faculty presenter
• contributing to professional dialogue
• appreciation for the facilitator’s role
• keeping the conversation constructive
• concluding with the debrief

The principals, having experienced the process at a Community of Learners’ meeting coordinated through the SOTF initiative, discussed the potential of this practice at Mid-Pacific Institute. Several high school teachers began inviting faculty schoolwide to tuning protocol sessions after school, which a few teachers across the campus attended and found very helpful in refining their practice. During the all-school Spring 2011 professional development day, faculty in mixed groups practiced the tuning process while listening intently to a colleague and examining student work, for example, math journal entries, history essays, science lab reports, then providing constructive feedback without being prescriptive. The process continued to be implemented, particularly by high school faculty requesting feedback to a lesson, sometimes not yet delivered. The innovation of the tuning protocol could be attempted in the third year of the SOTF initiative for several reasons. At this point, faculty may have been sufficiently dissatisfied with their current practices and less ambivalent about trying new strategies that they were able to observe in other colleague’s classrooms, such as in the elementary, or in demonstrations via professional development sessions. The tuning protocol provided teachers a process for confronting their own
fears without humiliation and with caring support from colleagues through substantive discourse about their teaching.

In the Spring 2011 semester of the SOTF initiative, the three principals were feeling more confident and more hopeful about the wave of change we were riding as a school, buoyed by mostly positive faculty feedback to schoolwide professional development, the number of teachers who were taking new risks in their teaching, and the tide of optimism that seemed to be slowly rising across the campus. We seemed to have reached a critical mass of committed faculty advocates whose perceptions and practice were largely respected. How could we capitalize on the momentum? I met with the director of development, who wrote the original grant and continued to write the successive grant requests over the five-year period of the initiative, with an idea that the name of the initiative (Schools of the Future) should represent Mid-Pacific’s adoption of the initiative. A new name, like an identity, would communicate to all school constituencies that Mid-Pacific was internalizing and committing to the notion of school change and its vision.

**Kupu Hou: “to sprout, to grow anew”**

Over several meetings, we discussed with the school’s Hawaiian cultural expert, a well-experienced and well-respected *kumu hula* or master teacher of the sacred tradition of hula and song, the underlying assumptions, beliefs, and values of Mid-Pacific. As a community of learning focused on students, Mid-Pacific was steeped in its own century-old history as two schools merging (Mills Institute for Asian boys and Kawaiahaʻo Seminary for Hawaiian girls) to create Mid-Pacific Institute, and then the more recent merger of Mid-Pacific Institute and
Epiphany School and the evolving identity of Mid-Pacific. He added the critical importance of sense of place, the fact that Mid-Pacific Institute emerged in Mānoa, framed by the Koʻolau mountains, below the ridge Kahalaopuna, the name of the mythical Hawaiian maiden buried in the ridge, and her father Kahaukani, the Mānoa wind, and her mother Kauakuahine, the Mānoa rain, who together make their presence known when they guard Kahalaopuna’s resting place.

The kumu hula brought to our last meeting a *koa* (a native Hawaiian wood prized for its resilience and strength) bowl of *kupukupu*, an indigenous swordfern that grows abundantly on the Mānoa campus. It characteristically thrives in different soil conditions and elevations, even sprouting from rock walls and concrete. He suggested that the kupukupu be considered an apt metaphor for Mid-Pacific Institute, having grown in its current location on nearly fifty acres of barren, rocky terrain in the late 1800s, evolving from the mergers of unlike schools and surviving educational program and financial challenges. From kupukupu, the phrase “kupu hou” was derived, meaning “to sprout, grow anew,” a rallying cry especially for Mid-Pacific’s faculty who would bear the greatest responsibility for embracing the school’s vision and implementing the practices that would address deep-rooted, systemic change. Kupu Hou also became the official name of the change initiative inspired by Schools of the Future.

I asked a parent who was a graphic artist to design a symbol for Kupu Hou, which can be found on the Mid-Pacific website at http://www.midpac.edu/kupuhou/#slide1. Every school culture has symbols representing the intangible cultural beliefs and values of the school (Deal & Peterson, 2009, p. 33), and this Kupu Hou symbol became a cultural rallying point for newly-developed collegial relationships across the preschool, elementary, middle, and high school —
three overlapping kupukupu branches representing the three schools, while two taller ferns suggest Mānoa Valley, emphasizing the value of sense of place. The green contrasting background forms the M for Mid-Pacific Institute.

Kupu Hou also took the form of a symbolic gathering of the school community on the official start day of the academic year in Fall 2011. Unlike previous years of convocation ceremonies held in the school auditorium, all Mid-Pacific employees (faculty, business facilities, administration, and support staff) have now been gathering outdoors for the annual convocation in the morning at Wailele Spring, a natural water source culturally referred to as the piko or spiritual center of Mid-Pacific. Imagine the setting: two hundred or more employees under the shade of bamboo trees and tall hibiscus plants, with Wailele Spring framed by the expanse of Kahalaopuna, while gentle tradewinds and open sky set the stage. The kumu hula chants an oli (lyrical Hawaiian expression, like a song) to welcome the community, reminding us of the sacredness of the natural setting. Each year since 2011, select individuals have planted kupukupu beside the spring, a powerful action symbolic on many levels — the kupukupu representative of the children we nurture and care for, the metaphor of our beliefs and values taking root through our work with students, the work of our hands and minds in shaping young minds, the belief that our endeavors as a learning community will thrive in spite of challenges. Kupu Hou has been an invaluable symbol of Mid-Pacific’s beginning transformation and evolving identity. Even the convocation ceremony, steeped in emotion and sentiment in a breathtaking natural setting on campus, has connected the community in powerful ways as an opportunity to building bridges to
a deeper sense of shared vision and collegiality and to the beliefs and values underpinning the school’s mission and vision.

**Faculty Leadership and Empowerment**

As faculty became more involved as professional development presenters, collaborated on learning activities across grade levels such as high school students in an animation class taking on preschool students as clients to animate their theory drawings of wind movement; Spanish language students in the high school creating children’s books with first and second graders; or participated in protocol sessions focused on the analysis of student work, the principals were also reviewing a major recommendation from the visiting committee of Mid-Pacific’s 2009 joint accreditation process with the Western Association of Schools and Colleges and the Hawai‘i Association of Independent Schools. The recommendation was that Mid-Pacific Institute consider hiring a curriculum coordinator whose primary responsibility would be to assist the faculty in aligning a preschool-through-high-school curriculum to ensure students a “seamless” matriculation from one school division to the next. While the principals agreed to curricular alignment, we not only viewed the role of curriculum development as one of our major administrative responsibilities, but also considered this recommendation as an opportunity to invigorate faculty leadership schoolwide. Pondering the notion of re-shaping the culture of Mid-Pacific, I suggested to my principal-colleagues that we consider a select group of faculty representing the grade levels who might be considered advocates of the change initiative or had been demonstrating “best practices” in their classrooms. We began with a small group of twelve in Spring 2012. The goal was to share the curriculum challenge with this faculty “think-tank”
group we had dubbed “Curriculum 21,” having been influenced by Heidi Hayes Jacobs’ 2010 publication on curriculum for the 21st century, and to collaboratively generate ideas, processes, and solutions to address curricular alignment preschool through high school. The principals would be willing to accept and implement solutions supported by the entire group.

They were an intuitive group, raising comments and questions on how to build from the college-preparatory focus of Mid-Pacific Institute and institutionalized programs such as the International Baccalaureate and Advanced Placement, determining criteria for quantitative and qualitative assessment, or engaging in the schoolwide discussion about content versus skills.

Minutes from the February 2012 meeting summarized a wide-range brainstorm of far-reaching questions, of which the following is a sample:

• How are we defining curriculum in the school? What are our ideas about a 21st century curriculum and instruction? What does that mean, and what does it look like? How do we manage conflict between schools, teachers, etc.? Who is implementing the changes, and who is managing those conflicts?

• If you talked with your colleagues, would they prefer to be part of this process--providing input, or do they want to be told what to do? How do we allow teachers to feel ownership and buy-in? What steps do we need to take?

• To what extent should we align curriculum, vertically and horizontally? What should the balance be?
• Looking at all-school initiatives, e.g., function of e-portfolios at elementary, middle, and high school, as well as transition from grades 5 to 6, 8 to 9, and 12 to university, do students have what the skills they need for the next step in transition years?

In successive meetings with the group, we revisited the extensive list of questions generated in earlier meetings, placing items in three categories: roles (of C21), process (actions leading to goals), and products (outcomes). Individuals volunteered to look at curriculum standards in content areas, including Common Core standards. In Fall 2012, with a new high school principal beginning the school year, we decided to expand the C21 group to include high school department chairpersons who would be working more directly with their respective departments on curriculum development and several more teachers from the elementary and middle school. With nearly twenty comprising C21, the principals and group members participated in a working retreat to articulate our assumptions and beliefs about teaching — refining our philosophical underpinnings — and more specifically, to analyze our existing school curriculum and what we envisioned for the next ten years as a School of the Future.

We spent several hours discussing the identity and function of C21. As an informal group, it immediately satisfied the need to deepen our professional relationships with one another. While schoolwide professional development provided opportunities for small group meetings across grade levels and content areas, the retreat framework created a more personal context for relating to one another. The principals and C21 faculty agreed to multiple functions of the group as a means of: generating new ideas or creative solutions; serving as a critical liaison between the faculty and principals; coordinating and facilitating the implementation of schoolwide
professional development; and serving as a sounding board for professional development plans (Schein, 1980, p.149-150). By no means an exhaustive list, the leadership role of C21 will continue to evolve as the school adapts to its unique identity as a merged K-12 educational institution.

From this historic retreat — the first of its kind since the merger of the elementary — developed the plans for the 2012-2013 all-school professional development, inspired by the work of the Courage-to-Lead founder Parker Palmer and the Center for Courage and Renewal. Just as the C21 retreat framework brought professionals together to develop trustworthy relationships, at least in the context of our curriculum alignment goal, I had discussed with my principal-colleagues the notion of more head-to-head and heart-to-heart conversations among faculty to revisit the reasons for their commitment to teaching as a profession, to deepen their practice, and to understand how to work together in order to transform Mid-Pacific Institute. C21 had come to the realization that creating a seamless K-12 curriculum had little to do with writing a curriculum framework. This outcome alone could have been achieved by compensating C21 to work during a summer to write curriculum strands based on existing curricula, and then to disseminate curricula to faculty for implementation. We avoided this meaningless outcome, certain that a complex, multi-level three-pronged approach addressing the integration of curriculum, instruction, and assessment was necessary to effect continuity throughout the grade levels. Moreover, if curriculum was an artifact of the school culture, then we needed to first look at how we could transform school culture from within the teachers.
The Fall 2012 all-school professional development day centered on the notion of philosopher-teacher Parker Palmer’s concept “we teach who we are.” After an inspiring talk by a well-respected faculty member who shared his “stepping stones” to teaching, framed in “racial singularity” and riveting anecdotes of teaching in an inner city school, the faculty wrote reflections on their own stepping stones. It was a sobering moment for me, seeing the entire auditorium immediately quiet down, teachers immersed in their thoughts and memories, writing on their electronic devices or simple notepad. We wrote together for an uninterrupted half hour, and had we more time, teachers might have opted for additional minutes. Meeting in self-selected groups of two to three across school divisions, the faculty shared their stories of individuals and specific incidents leading them to the teaching profession. Some groups took to the outdoors, comfortable on the lawn under shady trees, on stairwells, or under table umbrellas outside the cafeteria. Taking in the scene, I felt encouraged to see faculty entirely focused and conversant with each other. Faculty survey responses, if placed along a continuum, were mostly positive:

*I think today, more than not, focused on where we are and who we are, but there is still the open-ended question of who we will be, what kind of school MPI needs to be for our students in the future. And will our current structure -- curriculum, pedagogy, requirements, etc. be the right ones to get us there?* (high school teacher)
Knowing colleagues’ “stories” helps create connectivity, develops interest in one another on a personal level, and may lead to lifelong bonds of friendships. Discussing what works, what worries us and offering our suggestions allows the faculty to have a voice, to feel heard, and to find common ground. We made connections with each other. Although we are a diverse group, we are here for one purpose -- the students! (elementary teacher)

While on the other end of the continuum, a few faculty voiced pointed comments:

*When are we willing to have a real, honest conversation about the goals of the HS and MS? When are we going to have a frank talk that includes the students? We speak sometimes in a vacuum without hearing from other stakeholders.* (high school teacher)

*Why did we do this? What was the point? The ultimate point? Goal? Is this to take the heat off the "real issues" the schools are dealing with?* (high school teacher)

Some faculty were keenly aware of the disjunct between schools —

*How can we align so that all three schools are transparent and can become one?* (middle school teacher)
I think people’s motivations for teaching are very similar -- it just makes me wonder why what comes out in the classroom varies so much. I think that the elementary folks have the clearest understanding of what education is, while the other two schools are still unclear on what learning consists of. (high school teacher)

— but were also cautious about the increasing change momentum, to which becoming the first K-12 Hawai‘i school with a 1:1 iPad program (one iPad device to one student) prompted mounting levels of anxiety and stress among the faculty —

Let us breathe for a bit. We've been climbing a mountain. We are at a decent altitude, but we need to rest. Yes, we can go even higher to see even more, but we need a chance to take in the view right here for a bit. (high school teacher)

All points considered, the principals, in collaboration with C21, shifted the focus of professional development to matters of greatest urgency for the faculty: the integration of iPad technology across the curriculum and the implementation of project-based learning. The Spring 2013 all-school professional development meeting placed teachers in large working groups of ten to twelve in mixed groups to create public service announcements (PSAs) about Mid-Pacific Institute. Via a project-based approach, digital immigrants learned beside digital natives about iPad functions and apps appropriate to the development of a 3-minute video. In the planning
process preceding the actual filming, each large group discussed at length the identity of Mid-Pacific Institute, culling together the most important traits of the school, its history, its beliefs and values, and its identity. PSAs were viewed by all faculty at the end of the day and posted to the school website.

Another professional development day in the same semester featured faculty, again across grade levels and content areas, who were adept at integrating technology in their teaching. Teachers signed up for three different sessions throughout the day. A sampling of survey comments from three high school teachers acknowledged the decreasing gaps between school divisions:

*Found that I have a lot of ideas in common with teachers of all levels (elementary, middle, high). Appreciated discussion with colleagues. Key ideas? Change is not so frightening if we are given time to adapt with input from each other.* (high school faculty)

— an increasing acceptance of the need to change:

*There is a need to change the direction and goal of education if the goal is to have students perform differently. Going digital will give a longer-lasting more inclusive way to show student progress.*

(high school faculty)

— and an increasing confidence among the ranks and across school divisions in the professional expertise, experience, and knowledge of colleagues:
We’re all in this together! This is part of an evolution of the school that we are in the middle of. The main shift is from teacher at center to student at center. We have so much collective wisdom and experience in our staff—we have the internal capacity to do this!

(high school faculty)

In planning the fifth and final year of the SOTF initiative, the principals, with input from C21, made a bold move to identify a schoolwide overarching goal common to all three school divisions, in addition to continuing to identify separate goals relevant to the school division, as we had done in previous years. Understanding that the functions of curriculum, instruction, and assessment are interrelated, the principals chose assessment as the pathway for the entire school to re-think curriculum and inform curricular decisions and instructional practices. Together with C21, we framed professional development on these questions: What learning do we value as a school? What do our current assessment practices show what we value about learning? What should our students know and be able to do by the time they exit Mid-Pacific Institute as seniors and at transition grades, fifth to sixth grade (elementary to middle) and eighth to ninth grade (middle to high school)?

With support from external assessment consultants, the faculty participated in activities that grouped teachers by content area and across grade levels into elementary, middle, and high school classrooms to observe demonstrations of students co-constructing criteria around writing across the curriculum and mathematics problems. Emphasis shifted from a traditional focus of assessment on learning to assessment in the service for learning, that is, providing more
opportunities for formative assessment to more effectively guide student learning rather than emphasis almost exclusively on evaluation. In addition to the two all-school professional development days, the principals agreed to quarterly meetings on Wednesdays to bring all teachers together to further deepen their understanding of assessment in their respective content areas. For example, during one Wednesday afternoon, several teachers from math, science, social studies, and language arts and from across the grade levels shared their assessment practices. At another after-school meeting, teachers in transition grades (fifth and sixth, eighth and ninth) met in small groups by content area to analyze samples of student work, which naturally led to discussions about curricular content. The principals have committed to a second year of all-school professional development on assessment with the external consultants to look at how a variety assessment practices can more effectively inform evaluation of student learning.

With Schools of the Future funding ending in Spring 2014, Mid-Pacific Institute is resolute in sustaining the momentum of change. As the intent of the grant was to build capacity, Mid-Pacific has nearly doubled the $75,000 grant allotment so that we can continue all efforts to create a preschool through high school curricular framework. In 2014-2015, we will dive deep into the mathematics and science curricula since these have been the two disciplines with the most faculty resistance to change. In Spring 2014, all K-12 mathematics teachers participated in “learning walks,” a term introduced to Mid-Pacific by Tony Wagner, Ph.D., when he visited our school in Fall 2009. Over two days, the faculty visited several classrooms on campus across different grade levels to observe student participation and classroom environments, then debriefed their observations in small groups with a mathematics consultant. These eye-opening
observations generated understanding about mathematics instruction across the grade levels, with faculty seeing, in some classrooms, how math concepts such as properties of a square in geometry are addressed in fifth grade then revisited in more complex ways in the high school. However, there were stark differences in instructional delivery between the elementary, middle, and high school in terms of student engagement and the role of the teacher. A variety of assessments — classroom observations, student surveys, analysis of student work, and student presentations of learning — will help to inform the kinds of changes necessary to revise curriculum.

During the transformative years directly linked to the Schools of the Future initiative and Mid-Pacific’s embrace of the initiative in Kupu Hou, perhaps the most impactful outcome has been the process of group formation, an evolving sense of “groupness” or group identity so lacking in the years prior to the merger of Epiphany School and Mid-Pacific Institute. Schein identifies the challenges to group formation, and ultimately, culture formation: coming to shared understanding of a core mission; developing consensus on goals derived from the mission; developing consensus on the means to achieving the goals; developing consensus on the criteria for determining how well goals have been attained; and consensus on the appropriate repair strategies if goals are not being met (2010, p. 74). Although Mid-Pacific Institute was founded in 1908, coming to a shared understanding of a core mission was formidable between two very different schools that had emerged. The core mission of Mid-Pacific has not radically changed, though the merger of the elementary school in 2004 shaped Mid-Pacific’s aspirational vision (expressed in the vision statement). The Kupu Hou initiative, led by the principals and faculty
leadership, has charted the means not only toward developing a stronger educational program, but also a school community in the truest sense of community. The critical importance of professional development aside for a moment, one high school interviewee summarized how change begins:

So the culture of a community that shares and talks to each other is an identity I think for us that’s changing — how we see ourselves on campus and how we treat each other and how we learn from each other and talk about the work we’re doing. (high school faculty)

The engine of school change was and will continue to be professional development, fueled by leadership, shared beliefs and assumptions, and shared experiences. As Mid-Pacific Institute continues to change, what of its identity and the identity of the elementary school that became Mid-Pacific? And of what consequence is institutional identity?
CHAPTER 5

ANALYSIS AND DISCUSSION

Previous chapters made the case about the uniqueness of Mid-Pacific Institute’s formation, unlike other independent schools in Hawai‘i, as a merged school beginning in 1908 followed by another school merger nearly one hundred years later in 2004. While it would be reasonable to speculate that the 1908 merger transpired on rocky ground (literally and figuratively), the written history of Mid-Pacific did not include voices from the communities of Mills Institute and Kawaiaha‘o Seminary speaking about the cultural, social, and physical challenges they encountered on all school levels. Nor was there consideration of the far-reaching impact on the mission and goals of the merged school, and the identity issues a newly-merged school would have experienced becoming Mid-Pacific Institute. This autoethnographic study acknowledges the events and processes contributing to the formation of a “new” community rising from a combined 175 years of history, traditions, and values of two schools. This dissertation also recognizes the range of complexities at the systemic, organizational level to the social interactions among groups and and individuals. Previous chapters have provided an ethnographic accounting of a ten-year period, beginning with the merger and concluding with the co-acculturation process of Epiphany and Mid-Pacific Institute, as framed through my perspective in the narrative. The final chapter steps back to take a broad look at the merger and its impact on shaping the culture and identity of Mid-Pacific Institute through several concepts: complexity theory, institutional identity, and organizational culture.
The Merging of Two Schools through the Lens of Complexity Theory

The Mid-Pacific Institute narrative is a prime example of a complex adaptive system having undergone decades of fluctuation just in terms of the nature of mergers. Mason’s exposition on the relationship between complexity theory and educational change provides an entry into understanding Mid-Pacific Institute’s evolution. Complexity theory shares aspects of chaos theory in that uncertainty about conditions creates “substantial fluctuations in the behaviour of a particular phenomenon,” an “inertial momentum” that cannot be contained (Mason, 2008, p. 36), leading to emergence or change. Morrison (2002, p. 6) contends that complexity theory is a “theory of survival, evolution, development, and adaptation” in the context of complex organizations and systems composed of many “constituent elements or agents connected to and interacting with each other in different ways.” This aspect of unrestrained action and interaction is “dynamic and transformational” (Byrne, 1998, p. 51) causing the system to reach a critical level or “critical mass,” (Mason, 2008, p. 37), and a transition phase leads to the possible “emergence of new properties” until the system “maintains its own momentum in a particular direction” (Mason, 2008, p. 37). Add to complexity theory the notion of the rich connections among the “constituent elements” and “level of diversity within and between the schemas of the agents,” and the “information flow and feedback through the system across time” (Stacey, 1996, p. 99), the Mid-Pacific narrative escalates as a riveting, real-world application of complexity theory.

Focusing on the ten-year evolution of Mid-Pacific from 2004 through 2014, Epiphany took its place along the Mid-Pacific continuum at a time when Mid-Pacific itself was
experiencing its own fluctuations in relationships and program issues between the middle school and high school faculty and administration in the formation of the middle school. The boarding program, a hallmark of the school since its beginning in 1908, was in steady decline, threatening underlying values of Mid-Pacific Institute. Alumni perceived the boarding program as a significant contributor to character development (in the disciplinary expectations of students) and strong sense of family and lifelong friendships. The school had also been struggling with establishing itself among the ranks of more well-known independent schools in the community, an incessant concern among independent schools vying for students and tuition income in order to survive.

Epiphany itself had just undergone a two-year process of organizational upheaval, encountering “constituent elements” — students, faculty, families, the church vestry, an uncompromising landowner, a decline in enrollment, limited financial resources, and its location — a diversity in the “schemas of the agents.” Dynamic interactions and relationships led to an “inertial momentum” that could not be contained without the school completely closing. In light of the Mid-Pacific context, Mason’s contention is that there are many factors that impact change — “it is more a case of generating momentum in a new direction by attention to as many factors as possible” (2008, p. 44). The complexity of the merging of two schools, each with their own assumptions, beliefs, values, traditions, history, organizational processes, and structures seemed an insurmountable undertaking. As a leader and participant in this dynamic, transformative process, I can firmly attest to Mason’s assertion that “what it might take to change a school’s inertial momentum from an ethos of failure to learning excellence is a massive and sustained
intervention at every possible level” (2008, p. 46). Complexity theory may have utility for organizations, particularly complex systems such as education systems, whose leaders wish to initiate educational change. Davis and Sumara (2006) have proposed “conditions of emergence” that school leaders might consider to foster meaningful change. Although there are over ten factors or conditions in their book, I have selected the following as having been relevant to and substantiated in my dissertation –

• the extent of internal diversity among community members, which informs the possible range of responses and actions necessary for “intelligent” action (p. 138). Internal diversity existed not only between schools, but within each school in terms of their assumptions, beliefs, experiences, and knowledge base.

• the extent of internal redundancy among constituents as a complement to internal diversity in order to determine commonalities (p. 139). I uncovered this redundancy or overlap when coding transcripts from a range of constituents. For example, attitudes of resistance and apprehension about the merger were common among constituents in both educational cultures.

• the extent of coherence in the system, which allows a focus of purpose and identity (p.147). The mission and vision of a school are intended to shape the school’s purpose and identity, bringing coherence to the organization.

• the extent to which control is distributed; decentralization of focus refers to ‘emergent conceptual possibilities’ rather than a laissez-faire environment (p. 144). The release of responsibility to the Curriculum 21 faculty think-tank to collaborate with principals on the K-12 curriculum continuity issue and the increasing need for teachers teaching teachers was
strategic, certainly not left to chance. An orchestration of actions and the groups and
individuals responsible for these actions was critical to sustaining inertial momentum.
Mason adds one more condition of emergence — the “richness of connectivity between agents in
the system,” an idea which resonated for me as I observed this phenomena throughout the ten-
year period of the study. The notion of connectivity — the relationships among individuals,
groups, functions, strategies, beliefs, cultures — was a particularly powerful epiphany for me.

The previous chapters in this dissertation have provided, from my perspective and the
impressions of characters in the narrative, a detailed account and analysis of the level and
intensity of intervention required at every juncture in the merging of two schools. However,
complexity theory can only provide an explanation for the phenomenon but does not have
predictive ability regarding the causal relationship between the conditions and factors leading to
inertial momentum or emergence. Instead, complexity theory provided a holistic perspective to
help me make sense of my experiences of the merger and the unfolding complexities of
becoming one school.

**The Merger through the Lens of Institutional Identity**

Though this study is limited in its scope of inquiry to a specific time period marked by
the merger of Epiphany with Mid-Pacific Institute and tracing the school’s evolving identity
from 2004 through 2014, there may well have been several factors preceding the merger that
affected the organizational culture of Mid-Pacific Institute so that its identity failed to hold the
school together. In this section, I am speculating on factors, drawn from my experiences at Mid-
Pacific and from the responses of interviewees in my study, that may have contributed to Mid-Pacific’s struggling identity:

• The loss of the boarding program, often associated with the identity of Mid-Pacific Institute since 1908, affected the school’s sense of identity. The boarding experience engendered endearing values of family, camaraderie, community-building, and character building that alumni recalled during interviews and discussed with emotion. Although administrative decisions to end the program were financially warranted, alumni viewed the closure of the boarding program as the school’s dismantling of its mission and the end of many school traditions associated with the boarding program.

• Extracting faculty from the high school to form the middle school faculty was viewed as intrusive by other high school faculty. According to interviews with faculty who had experienced the divisiveness during the process of establishing the middle school, they felt that program changes were not communicated clearly, and faculty were not included in the decision-making process. A middle school philosophy was still being developed even as the elementary school was merging with Mid-Pacific.

• The perception that Mid-Pacific Institute was “the very quiet private school in Mānoa” became its own well-kept secret. While other schools may have been developing a competitive edge through fiscal development, programmatic changes, or public relations, Mid-Pacific was slow to the game, resting comfortably on its laurels as a “hidden gem” in Mānoa, an image ironically emphasized in public relations materials.
• During the 1980s, Mid-Pacific became an innovative leader in the area of the arts by developing a school within a school—the Mid-Pacific School of the Arts, which at first developed independent of the high school then was later integrated into the educational program. At about the same time, Mid-Pacific became the first school in Hawai‘i to offer the International Baccalaureate Program (in addition to an Advanced Placement Program), which also developed independent of the high school program and offered a more academically rigorous alternative to the Advanced Placement courses. Although these were both high-profile programs, the underlying assumptions and values of these subcultures were not readily transparent to all faculty, and for some may have threatened the culture in which they were most comfortable.

Taking these factors together, it seems reasonable that institutional identity was questionable. Was diversity with varied foci in the educational program the goal? What was Mid-Pacific Institute becoming? To what extent were these decisions to gain a competitive edge or to best meet the needs of students? It seemed that the lack of clarity and focus in its evolving identity as perceived by the school’s members added to the disruptions caused by the merger process and that the consequences on institutional identity were indeed significant to the organizational culture.

During the merger process, one of the most obvious concerns centered on the notion of institutional identity, the perceptions of how members view their organization versus institutional image, more loosely reputation, how others perceive the institution (Gioia and Thomas, 1996, p.
Although identity and image are often associated with one another, identity is that which is central, distinctive, and enduring about an organization, by which the organization is defined and with which its members associate (Albert and Whetten, 1985). In the context of Hawai‘i independent schools, the missions of each school might serve as identity markers, though mission statements alone do not delineate identity, as the italicized words and phrases in the mission statements of four Hawai‘i independent schools indicate similar organizational aspirations and beliefs:

[School W] is a nurturing and vigorous learning community. Our college preparatory program strives to create curious, active learners who excel scholastically and have the opportunity to develop their personal skills and talents. Students are supported in learning to lead balanced, healthy lives, to appreciate the arts, and to value the diverse perspectives of other people and cultures. Our goal is to develop knowledgeable, responsible and caring young people of character who help to create a more peaceful and sustainable world through understanding, stewardship and respect.

[School X] — a preschool through high school, college-preparatory community founded on Christian values — nurtures and challenges students to develop intellectual, emotional, artistic,
spiritual and physical strengths to become compassionate and responsible lifelong learners and global citizens.

[School Y] To provide an environment where students can

- Develop moral and spiritual values consistent with the Christian principles on which [School Y] was founded, affirming the worth and dignity of each individual.

- Develop intellectual, academic and physical potential to the fullest degree, preparing them for college and for challenges facing them now and in the future.

- Develop and enhance creativity and appreciation of the arts.

- Appreciate cultural diversity and develop social responsibility.

[School Z’s] mission is to develop liberally educated, well-rounded individuals who are well prepared for higher education and for responsible, moral citizenship.

Overlapping values and program domains, such as Christian principles, the teaching of moral and ethical values, citizenship, the presence of the arts, emphasis on intellectual, social, emotional, and character development are common to these four schools and do not appear to distinguish these schools. Mission statements alone do not define or characterize institutional
identity, but rather the whole of many parts, including traditions, values, history, sense of place, and the history, values, and beliefs of the individuals comprising the school community.

Aspects of school identity were central in interviews with faculty, parents, trustees, staff, and alumni. When I asked interviewees about their perceptions of Mid-Pacific Institute’s identity prior to the merger, most of them associated the school’s identity with its mission to provide a “rigorous curriculum that was going to prepare students for college” and “where there seemed to be a lot on the academics or test taking so that scores could be achieved, so that the kids can go to certain colleges” (faculty/parent). There was an even stronger association of Mid-Pacific Institute as a boarding school from alumni who themselves were boarders. Interviewees less involved on a daily basis with the school but still having responsibilities to the school, such as board members or administrators, considered Mid-Pacific “the very quiet private school in Manoa with good academics and a dormitory.” Other faculty and staff interviewees from the elementary school provided a less flattering perception of Mid-Pacific Institute as they had heard from others or had been the school’s reputation when they were growing up in Hawai‘i:

Mid-Pacific was kind of the reject school. I kind of hate to say that, but it was a school that you went to when you couldn’t get in to the top tier schools. (staff member)

Even if not considered the best school in Hawai‘i, Mid-Pacific’s saving grace was its reputation as a college-preparatory school.
Unfortunately, I actually heard of Mid-Pacific Institute as a second- or third-rate school. I guess if kids couldn’t get into other schools, then they went to Mid-Pacific, the next best thing. I always heard of it as a second choice school but also that it did have a really good reputation for getting kids into colleges because it was so academic. (former Epiphany faculty and current and Mid-Pacific faculty)

Even an alumnus admitted with embarrassment the lackluster support from the school’s own graduates from the 1970s through 1990s:

*It was the type of school that people considered a default choice.*

*While the alumni were bonded because of the dormitory, I always felt that they weren’t proud to stand up in the community and tell people that they had graduated from Mid-Pacific. So, it was kind of like “keep your head down” and get through it even though people really loved each other and the teachers for their caring attitude.*

(Mid-Pacific staff)

Borrowing from a popular S.E. Hinton title, “That Was Then, This Is Now,” I asked interviewees to think of a metaphor to describe Mid-Pacific Institute’s current identity [2014] since the 2004 merger. Their metaphors reflected a perception of growth, action, synergy, diversity, community,
optimism, and mystery in the school’s evolving identity, a dramatic difference in their perceptions about Mid-Pacific before the merger —

MPI is like a cake where you put different ingredients together. If you put the right amount of this and the right amount of that together, what is baked comes out to be something quite delicious and something quite wonderful and that people want. And I looked at the putting together of Epiphany and Mid-Pacific as adding ingredients to make something greater. And there's more to come because you and the others and the new president will start looking for those ingredients to add so that we can say, "Well, maybe our cake can rise a little higher. We can try a little different frosting and see where we can go with this. (former Mid-Pacific administrator)

I think like we’re a giant stew. There are a lot of different ingredients that go into that pot. And there isn’t one ingredient that’s more important than the other. If you don’t add something, then you know something is missing. (former Epiphany staff and current Mid-Pacific staff)

MPI is like a pirate’s den or a king’s tomb. It’s very dark. With your flashlight, you shine it into the den and see all these sparkly
jewels. You want to explore the den even more. You know there’s more, but you just can see it. You just want the light brighter, but it’s dark, and there's fear. But with fear there is also an excitement and more learning, but only if you step into the fear. (former Epiphany faculty and current Mid-Pacific faculty)

Kupu Hou is a very smart idea we all can grab on to, that idea of sprouting something from a seedling and growing, germinating, developing, taking its own shape. The idea of organic that it will grow where there’s light and where there’s water and it planted here, it’s not going to look the same as it does there. It’s going to be different depending upon how it’s nurtured. I think it’s a great way to think of Mid-Pacific. (Mid-Pacific faculty and parent)

The reason I think the phoenix is a good metaphor is the image of the phoenix, bursting out and looking spectacular. But the part about the phoenix I think is important is that the phoenix regenerates. The phoenix gives birth through itself. It’s not when the phoenix burns out and falls to the ground that’s the important part. It’s when it emerges again as a phoenix again and again. (Mid-Pacific faculty)
I’m thinking of how a wave comes on to the sand. You can see it as the wave retreats off the sand, leaving a mark and then slowly receding. In that image we see that it’s a nice mix of both the water and the sand and that becomes the foundation. It’s such a discreet thing that the ocean does when it comes upon the sand. You can hear it almost bubbling away as it moves and watch that water line upon the sand kind of evaporate. The hope would be that what’s left behind is as wonderful as the mix of those two things because there is the power of the ocean and what it brings, and there’s the power of the sand and what it holds as a foundation. You hope that as the bubbling noise and water recedes that what you have left behind is stronger than what was there before. I think that would be a metaphor appropriate for Mid-Pacific Institute because it is so much stronger than it was [before the merger]. (former Mid-Pacific administrator)

Other interviewees compared the school’s identity to a bonsai tree, with a community responsible for training it to grow and bend and helping it adapt to its environment; the “little engine that could,” persevering the uphill climb; a child growing and developing in different stages; a hardy, sturdy tugboat that never tips over or sinks and is able to pull many times its weight; even an image of Mid-Pacific as a teleporter able to take students anywhere they wish to
travel. These metaphors suggest a perceived change in Mid-Pacific’s identity, associated with the merger over a relatively short period of time.

Having detailed the challenges of the merger over a ten-year period, I believe that the merger was a success, though not according to the ideal scenario wherein the acquired school relinquishes its pre-merger identity and simply adopts the identity of the acquiring school. The faculty and staff of Epiphany School, myself included, experienced the inevitable culture clash, not so much the result of a radical difference in assumptions, beliefs, and values, but in the identity crisis facing Epiphany. As previously discussed in the chapter on Epiphany’s transition experiences, resistance to subordination was a reactive instinct of survival. But there was equally the sense that an interface in the motives of both schools could result in synergy, whereby the acquiring school and the acquired school could mutually influence and mutually benefit from each other — which I deem a successful merger.

The study of this anthropological phenomenon is acculturation, defined as “changes induced in (two cultural) systems as the result of the diffusion of cultural elements in both directions” (Berry, 1980, p. 215). The acculturation process usually focuses on the culture that is being “invaded,” in this case, Epiphany, and focuses on the ways in which the Epiphany constituents, specifically the faculty, staff, families, and myself as the educational leader, adapt to the Mid-Pacific Institute, referred to as “intruder” (Nahavandi & Malekzadeh, 1988, p. 83). The terms “invaded” and “intruder” in the citation are explained in the context of mergers in the corporate world or in models of colonization and in no way characterize my perceptions or any of the interviewees’ perceptions of the Epiphany/Mid-Pacific Institute merger.
Berry (1983, 1984) identified four modes of acculturation — integration, assimilation, separation, and deculturation. According to Berry, integration is initiated when acquired members intend to preserve and maintain their own culture and identity by remaining autonomous and independent. He contends that integration leads to a structural assimilation of two cultures, though with little cultural and behavioral assimilation. On the other hand, London (1965) asserted that although integration involves interaction and adaptation between both entities, there is no loss of cultural identity. The acquired organization attempts to maintain its own beliefs, practices, and systems that make them unique, though they are willing to be integrated into the acquirer’s organizational structure. In this scenario, integration is only possible if the acquirer permits this kind of independence. There is some degree of change in both groups’ cultures, though there is balance with neither the acquirer or acquired trying to dominate.

Assimilation is the mode of acculturation in which the acquired willingly adopts the culture and identity of the other, relinquishing their culture and organizational practices, and becoming absorbed by the acquirer so that the acquired’s cultural identity ceases to exist. The third mode of acculturation — separation — involves the acquired organization’s intent to preserve their identity and practices by refusing assimilation with the acquirer in any way. The condition of separation means that the acquirer and acquired function independently. The fourth mode — deculturation — occurs when the acquired entity does not value its own cultural identity and has no intent of being assimilated into the acquirer’s organization. As a result, the acquired entity dissolves. (Nahavandi & Malekzadeh, 1988, p. 82-83).
The mode of acculturation is based on several variables: the degree to which the acquired entity intends to interact with the acquirer; whether the acquired entity values its cultural identity; the attitudes of both acquirer and the acquired to acculturation; the degree to which the acquirer is multicultural, such as values cultural diversity; and the degree of relatedness between the acquirer and the acquired (Nahavandi & Malekzadeh, 1988, p. 83-84).

In the case of the merger between Epiphany and Mid-Pacific, detailed in previous chapters, both schools willingly approached the merger as autonomous, independent entities with similar motives to grow beyond survival. Epiphany hoped for continuity and the cultural preservation of its beliefs, values, and ways of teaching and learning, while Mid-Pacific Institute’s goal was to build a “complete” school consisting of preschool through high school levels in order to more competitively situate itself among other top-ranked independent schools. While it may have been Mid-Pacific’s original intent at the board level that the elementary completely assimilate to the point of losing its identity, Epiphany worked toward integration and a synergistic balance with neither school dominating. A prominent Mid-Pacific administrator central to the merger process expressed an attitude of openness to the diversity of beliefs and cultural practices that the elementary would be contributing to the formation of a new school identity:

*I’ve always felt it’s like two hands together going forth where you bring and we bring together. Together, we’re really something. You*
[Epiphany School] were a big impetus of the change of the image of the school and who we were . . . (former MPI administrator)

Assuming the name “Mid-Pacific Institute” did not signify the demise of Epiphany’s organizational core because there were assurances along the ten-year journey, albeit hard-earned, that the elementary’s assumptions and beliefs about teaching and learning were equally valued by and central to Mid-Pacific Institute’s evolving identity.

**School Identity through the Lens of Organizational Culture**

Where mission statements are a beginning to defining school identity, the concept of organizational culture provides a broad, comprehensive lens that includes the phenomena that contribute to an understanding of institutional identity, such as the observable behaviors when the internal community members speak and act toward each other and people external to the community, or the traditions, customs, rituals, and celebrations specific to the community. Other phenomena are the articulated values the group claims to achieve or aspires to achieve; the shared meanings created by the group members as they interact with each other; the climate or feeling conveyed in a group by the physical layout and the ways in which members interact with one another (Schein, 2008, p.14-16). Although these factors per se are not culture, they reflect the depth and structure of culture.

Organizational culture as “process and product, effect and cause” (Evans, 1996, p. 44) serves as a powerful force that represents the collective knowledge, history, and ways of thinking and doing of an organization’s predecessors and is constantly renewed and re-established as new
members are initiated into the organization. Evans goes on to say that culture teaches and models “a fundamental way of seeing, understanding, and responding . . . giving meaning to people’s experience . . . how they interpret and react to events” (1996, p. 44). Culture, as a conservative force, seeks to provide continuity, stability, consistency, and meaning to its members. Although culture is not institutional identity, a school’s identity should reflect at the deepest level of culture, its basic assumptions, values, and beliefs that guide and shape the way group members might consciously or unconsciously think, act, and feel about teaching and learning.

In managing change in a culture, there are three “tasks of transition” (Evans, 1996, p. 55) that the merged Mid-Pacific Institute implemented — 1) “unfreezing,” reflected in Schein’s notion of “unfreezing” (2008, p. 300), the concept that in order for transformation or change to begin, the system must first experience enough disequilibrium to motivate change; 2) helping those who must adopt better practices move from a sense of loss to commitment; and 3) creating psychological safety.

The introduction of the elementary with its developmentally-appropriate practices and fundamental assumptions about learning, a new vision for the school, challenges to traditional instruction, and a focus on 21st-century skills prompted disequilibrium, anxiety, and threats to psychological safety. Unfreezing meant confronting the need for change prompted by the Schools of the Future initiative, by attempting change in teachers’ current practices, and assuring the faculty that innovative practice is attainable with errors along the way as positive indicators of risk taking.
The second task of transition is helping those who need change let go of the old and embrace the new. This is a daunting task on a professional and emotional level, within individuals and groups. For example, the wave of technology innovation has pressured all faculty to integrate devices and apps into their teaching, not to simply replace routines and practices, but to change the very ways they think about schooling. If change agents only aim for “first order change” — one-shot, isolated ideas — changing a school culture becomes futile (Evans, 1996, p. 5). Rather, “second-order change” — activities and experiences systemic in nature that requires people to shift their beliefs and perceptions — will more effectively lead to changing a school culture. To this end, resources were committed to ensure that a concerted effort to support professional development across the curriculum and across all grade levels was sustainable.

The other sense of loss — the loss of group identity — was perceptible for members of Epiphany School who expressed their fears of and anxiety about the merger, particularly its unpredictability and unknown factors, such as the physical environment, procedures, expectations, and most importantly, the loss of their group identity. The first five years of the merger focused on the task of transition by being as transparent as possible about expectations and consistently communicating with all faculty and staff (preschool through high school) through blogs, assemblies, and frequent meetings with school leadership, the details of the transition process explained in previous chapters.

The third task of transition is about creating psychological safety for the organization’s members so that they can move from a sense of loss to commitment, from feelings of incompetence to attitudes of competence. Schein recommends several activities that should be
simultaneously implemented in order to sustain momentum (2008, p. 305-306). A few relevant to Mid-Pacific Institute context are mentioned here:

• Members need to have a compelling vision to change their thinking, and leadership must clearly articulate non-negotiable expectations in behavioral terms. Board members at Mid-Pacific created a vision statement in 2009, which made school leadership responsible for developing a long-term action plan encompassing a re-visioning of program instruction, curriculum, and assessment of student learning under the Kupu Hou banner. This work of transformation will continue to evolve beyond the completion of this dissertation.

• New ways of thinking about teaching and learning require formal and informal training grounded in research, theories of learning, and developmentally-appropriate practices. The presence of the elementary school provided examples of “best practices,” such as inquiry-based learning, project work, thinking routines, summative assessment, and documentation of learning in electronic portfolios, which the middle school and high school could readily observe in the context of Mid-Pacific Institute. Kupu Hou formalized faculty learning by institutionalizing several days of schoolwide professional development addressing global concepts in the school’s vision statement.

• According to Schein, “the goals of learning are non-negotiable, but the method of learning can be highly individualized” (2008, p. 306). Teachers must have a sense that they can manage their own learning process over time. The practice of faculty goal-setting with the school’s vision in mind, the notion of the principal as coach and guide, and the involvement of the learner in
formal and informal professional development with colleagues are essential factors in supporting psychological safety.

• Organizational structures should make it possible for members to collaborate as a team. In a relatively large school with four distinct grade-level divisions, seeking opportunities for meaningful collaboration among faculty or students is achievable, though challenging. Different schedules create obstacles. To the extent that professional development in the Kupu Hou framework continues to support collaborations of the “second-order” — systemic, deep-rooted, and more meaningful in terms of impacting beliefs and values — we can hope to provide the best learning conditions for our students.

The Role of Leadership

According to Schein, the relationship between culture and leadership is most evident in organizational cultures (2008, p. 3). The culture we observe and experience is the result of embedding the founder’s assumptions, beliefs, and values, which become the footprint of the organization. As the organization develops and matures into a culture — espoused values, a formal philosophy, implicit rules of behavior, shared meanings and understandings as members interact, school climate, habits of thinking, and rituals and traditions — an organizational culture is ultimately created, embedded, and evolved by leaders. There are countless theories of leadership, abundant studies of leaders and the anatomy of leadership. To name a few: Jim Collins’ “Level 5 Leadership” describes this executive-level leader, the highest level, as blending “extreme personal humility with intense professional will” (2001, p. 30). Gardner explains the
nature of leadership as responsiveness to settings, history, and constituents, and the work of leadership requiring “major expenditures of effort and energy” (1990, p.19). Through their research, Kouzes and Posner (2002) discuss the dynamic process of leadership and five practices of exemplary leadership: modeling the way by taking action on their own guiding principles; inspiring a shared vision; challenging the status quo; enabling others to act; and building a strong sense of collective identity and community spirit through challenging times. Goleman’s premise (1998) is that the most effective and masterful leaders are those who are able to switch to different leadership styles along a continuum— coercive, authoritative, affiliative, democratic, pacesetting, and coaching — that creates the best organizational climate and addresses the demands of particular situations.

The point of this brief discussion on the role of leadership is to iterate the scope of a leader’s influence on organizational culture. I have intentionally positioned the discussion on the role of leadership at the end of my dissertation because in the context of the merger and ongoing developments of Mid-Pacific’s organizational culture, my notion of leadership, its responsibilities and possibilities, has deepened my own sense of identity. References to leadership and its influence on school culture run throughout my dissertation like a symphonic theme, sometimes in major harmonic chords and at other times in different keys and rhythms. During the ten-year period of this study, Mid-Pacific experienced several changes in leadership. Three high school principals, two middle school principals, two school presidents, and most recently, three new senior administrators. I was the constant, the point of reference through the
merger process, while the elementary school became the catalyst for informing the new vision of Mid-Pacific.

Evans, in *The Human Side of School Change: Reform, Resistance, and the Real-Life Problems of Innovation*, (1996), writes: “Transformation begins with trust. Trust is the essential link between leader and led, vital to people’s job satisfaction and loyalty, vital to followership” (p. 183). He continues to say that beyond trust, a leader inspires confidence among constituents and that authenticity is distinguished by a leader’s integrity and savvy — “Integrity is a fundamental consistency between personal beliefs, organizational aims, and working behavior.” (Evans, 1996, p. 184). In other words, the individual practices what she preaches and preaches what she practices. Hand in hand with integrity is savvy — common sense, practical knowledge, intuition, and the capacity to handle matters expeditiously. Solomon (2004) also regards trust as the emotional core of leadership, more of a transaction or active relationship between leaders and constituents characterized by “some commitment, contract, or agreement,” (p. 97), a “precondition of any alliance or mutual understanding” (p. 95). Thus, an authentic leader is one who is a “credible resource who inspires trust and confidence, someone worth following into the uncertainties of change” (Evans, 1996, p. 185). This particular quote echoes back to that momentous gathering with my Epiphany faculty and staff in 2002, when I asked them to trust that the potential merger of both schools was a challenge worth risking and that our Epiphany identity would persist in our work with students. Several years later, we came to understand that the integration process with Mid-Pacific would transform Mid-Pacific
I have come to understand that achieving a trust relationship in transforming an organizational culture is an important entry. Leadership theories aside, I reflect on my own evolving identity against the backdrop of Mid-Pacific’s evolving identity, framed by three concepts of leadership I have come to at this point of my professional development: leadership as a covenant relationship, leadership as the action of empowering others, and leadership by example.

**Leadership as covenant relationship**

An essential aspect of leadership is developing covenant relationships with members of the school organization, a trust agreement between myself and others — a sacred agreement — that I am committed to their professional and personal welfare and their developing sense of “becoming” in relation to the community. I understand that this notion of a covenant relationship between myself and those I lead is bound by our shared assumptions, beliefs, and values about learning, teaching, and children. Sergiovanni, as cited in Pellicer’s *Caring Enough to Lead* (2008), eloquently captures the essence of my deeply felt beliefs about the nature of leadership: “The heart of leadership has to do with what a person believes, values, dreams about, and is committed to — the person’s personal vision . . . “ I particularly embrace the importance of “joining the heart and the head of leadership with the hand of leadership” (p. 8). Spirit and soul, emotion and intellect must guide and support my actions. Although there are varying degrees of
internal conflict between the heart and the head of leadership, which can dangerously immobilize or create indecisiveness, having the core attitude of developing covenant relationships centers me. Dissolving the corporation of Epiphany and assisting the faculty in finding employment in other schools was an option, as was exiting Mid-Pacific after construction of the new elementary and stepping aside for a new principal. However, my perceptions of the faculty, staff, students and families, perceptions of the immediacy of the merger, and self-perceptions led to my decision to honor the covenant relationship I had entered into when I became head of school seven years earlier. My commitment was to the vision of evolving the “new” identity of Mid-Pacific by helping the school community, especially the elementary faculty and staff who came with me to Mid-Pacific, “to see change and its losses as part of an expectable, inevitable sequence of events,” (Evans, 1996, p. 222) so that they could begin to connect “past, present, and future together again with rewoven strands of meaning” (Marris, 1986, p. 21).

**Leadership as empowering others**

I believe I have a responsibility as a school leader to guide others to realize their potential, “to be better in terms of what they do and who they are as human beings” (Pellicer, 2008, p.13). The act of empowering my colleagues is possible only if I hold the belief that other persons are inherently capable of what they aspire to do and who they aspire to become. Not only do my faculty feel empowered — they are empowered because they see themselves as active, engaged, responsible, collaborative, in the same light as they deem their students as active and engaged learners. Empowering others goes beyond encouraging words, the pat on the back, or effusive
praise. It entails releasing this power of responsibility to others and inviting them to decision-
making and honoring their ability to do so —

Empowerment does not mean license; it refers to obligation and
duty and accountability. It does not free people to do whatever they
please, but to make sensible decisions that embody the school’s
values (Sergiovanni, 1991, p. 137).

I have learned that empowering others contributes to the formation of a strong school
culture. When I first became a head of school, I understood my role as being the lone decision
maker; the Board chair at the time advised me that all decisions should be made by me and that it
was dangerous to let others in on your thinking about issues lest they discover the chink in your
armor. Experience has taught me otherwise. I have become more adept at leveraging the
strengths and talents of individual teachers and inviting them to opportunities for school
leadership. I have also come to realize that the complex conditions for empowerment and
collaboration require a fundamental shift in how teachers perceive themselves as professionals
and how they invest their time teaching students and working with other adults. The notion of the
school as a community of professionals who can make informed choices by drawing on their
knowledge and expertise not only can contribute to higher levels of productivity and a positive
school climate, but also to their sense of control and accountability (Evans, 1996, p. 231). While
the notion of empowerment may be an ideal, the concept has the potential for transforming
schools into self-reflective, self-renewing learning cultures for one primary purpose — the
students. In the context of Mid-Pacific Institute, the C21 faculty group and increasing reliance on
the teachers-teaching-teachers model are contributing to creating a culture of collegiality on campus, that is, a culture of serious professional collaboration.

**Leadership by example**

Leadership by example is the most effective teacher, and so I set high expectations for myself and for the sake of others. I was fortunate to have had parents whose work ethic and sense of integrity so engrained these values in my being. I remember vividly the hours my parents put into their work (my mother as an elementary teacher and my father as a self-employed barber and businessman) and yet had time to raise five children. I was fortunate to have had teachers who demonstrated excellence in their teaching and whose passions about learning inspired my teaching. I have known parents whose example about raising their own children to become independent, responsible, and compassionate individuals continue to give me hope for the future. My teachers know that I would never ask them to do anything that I would not do myself — we are in study groups together; I ask them to post weekly blogs about their teaching just as I post a weekly blog for the general public and have been doing so for many years; we deliberate together and take risks together. They see me struggle with issues, leading from what I believe, and I invite them into my thinking. If I expect them to work hard, then I work hard, if not harder, beside them.

In the early years of the merger, I admittedly resisted the loss of the Epiphany identity and sought ways to preserve this identity as separate from Mid-Pacific Institute. There were small, but concrete victories the first year of the merger. The Epiphany logo of three children with hands clasped under a rainbow found permanence on the back of the students’ uniform shirts.
One of the conference rooms in the elementary building was named the Epiphany Room and currently houses artifacts, such as school publications, photo albums, and awards from Epiphany School. Our “children first” philosophy was embedded in the school handbook, but the most significant achievement was Mid-Pacific’s embrace of “children first” as a vital core assumption and value of the school.

In retrospect, the loss of identity was perhaps the most egregious to me, and so this desire for permanence became an underlying motivation to strengthen and hone the elementary program with singular focus. Three years prior to the merger, as the Epiphany Board of Directors and I began to understand that chances for Epiphany’s survival were limited, the faculty and I worked on revising the curricular frameworks for all content areas, performance continua for reading, writing, art, physical education, and music. For me, the phrase “if you build it, they will come” suggested building and strengthening the educational program, not a literal structure. I recall an important meeting with the headmaster of a well-known independent Episcopal school from whom I sought counsel about a merger and the closing of Epiphany. In his shorthand note to emphasize his talking points, he wrote “vision” followed by “program” then “facilities,” the crux being the vision of a school, undergirded by assumptions, beliefs, and values that inform the educational program, and facilities that support the implementation of the program. The critical importance of ensuring a high-quality program resonated for me as my central responsibility as a school leader.

In an effort to boost the confidence of my faculty and their educational efforts, I often compared our innovative and progressive practices to the unchanging, traditional, sometimes
punitive practices in the middle school and high school. I felt compelled to boost my faculty’s
certainty and to strengthen their resolve as teaching professionals whose expertise, knowledge,
and experience I respected and valued. Feeling like David overshadowed, and sometimes
threatened by Goliath, I was resolved to protect our identity. However, I began to realize that my
leadership was divisive and the long-term health of the elementary was contingent upon the
success of the middle school and high school. I needed to model the way toward integration and
helping to re-create the identity of Mid-Pacific Institute. To this end, I applauded the educational
innovations of middle and high school faculty and sought more opportunities for collaboration
across the school. I began identifying school leadership among the principals as a collective
“we,” to the extent that the TED acronym represented the first name initials of the high school,
elementary, and middle school principals, thus conveying the notion that the three schools with
distinct developmental foci were one school, one identity.
CHAPTER 6
CONCLUSIONS

The merger narrative of Mid-Pacific Institute and Epiphany School, a complex drama with many characters, subplots, and themes, offers several points for school leaders and school communities to consider:

• First, school leaders and members of the school community must **articulate their understanding of the school’s assumptions, beliefs, and values about the nature of learning and teaching**, the role of and relationship between student and teacher, and the school’s aspirations in order to best address the potential of students. In the merger of Mid-Pacific and Epiphany, these underlying assumptions and beliefs had not been adequately vetted, which led to several years of mistrust and emotional strain among faculty and staff. The burden of responsibility rests with school leaders to create conditions for open, professional discussion.

• Second, **organizational change must be systemic in nature**, addressing the school’s assumptions, beliefs, values, structures, roles and norms as opposed to single, isolated changes that function merely as band-aid solutions. Moreover, organizational change requires a sustained investment of time and resources. Case in point: The Schools of the Future five-year initiative empowered Mid-Pacific Institute to convert this external program into its own fully-implemented self-sustaining initiative (Kupu Hou).
• Third, **the impact of loss of identity cannot be overestimated.** In a merger, the entity being acquired has its own unique culture, history, relationships, beliefs and values, ways of thinking and doing that cannot be so easily expunged. Leveraging the strengths and attributes of the merged organization can strategically contribute to the formation of an even stronger organizational culture. Mid-Pacific allowed the elementary school to retain cultural artifacts, for example, a memory book (yearbook), school logo, and cultural events, some of which have been integrated into the entire school, such as an afternoon picnic at the beginning of the school year to gather all families in each division and a student transition ceremony from elementary to middle and from middle to high school.

• A fourth consideration is that **creating and sustaining an organizational culture requires “massive and sustained intervention at every possible level”** (Mason, 2008. p. 46) and calls for authentic leaders who are vigilant and equally committed to the school’s mission, vision, and constituents, as well as to their own personal beliefs and values. The school community is confident when there is coherence in a leader’s actions, decision-making, and values.

• Another important implication is that **focused and sustained professional development over time, with key faculty in leadership roles** (teachers-teaching-teachers model), acknowledges the value and strength of their expertise, experience, and knowledge. Their active participation in appropriate decision-making processes, such as in curriculum and instruction, areas closest and directly relevant to the student, contributes to a collegial climate and sense of accountability to the school.
• Finally, the subtext in this autoethnography has been the **critical role of authentic leadership.**

Trust, confidence, integrity, character, vision, philosophy, savvy, focus, strategy, passion — these and other attributes comprise the “stuff” of authentic leadership. Every school has an evolving identity if it is truly accountable to its constituencies and responsive to the political, social, and economic conditions that impact education. Since school identity is inextricably connected to leadership, school leaders should conscientiously ask themselves: How do I define my role as a leader? What inspires the best in faculty and staff? What are my strengths? How well do I understand the school and its community? How prepared am I to handle the school’s challenges? Am I the right person to be leading right now? (Evans, 1996, p. 195-196).

One final thought about the context of this study of a school merger: While a merger has a specific legal and contractual meaning involving the acquisition of the assets and liabilities of another corporation, a merger serves as an apt metaphor for the dynamic challenges of “doing” school. Aligning the curriculum of school divisions, unifying factions of faculty under shared assumptions and values of teaching and learning, forming an alliance of school leadership, coalescing instructional practices and assessment methods so that students’ learning experiences as they matriculate from preschool through high school make sense along a continuum of developmentally-appropriate ways of thinking and doing — these are all examples of how schools are constantly merging, are they not? Perhaps the nature of school perceived as a dynamic, transformational cycle of merging has relevance for all schools. So the merging continues . . . .
A School’s Identity: In Process

Before the former school president retired, he left a conceptual blueprint for the new president to implement focused on Mid-Pacific’s aspirations, the end result to significantly change the educational program and environment in order to set the standard for a 21st-century teaching and learning program in the nation. Bold aspirations! Some of these aspirations are to develop a Center for Teaching and Learning that continues the efforts of the Kupu Hou initiative and the teaching of 21st-century skills, like creativity, communication, critical thinking, problem solving, entrepreneurship, and global awareness through affiliations with institutions of professional development and business partnerships. Kupu Hou Academy, now in its third year, draws educators from the public and private domain collaborating on cross-school projects and curricular projects within school communities. According to its intended mission, the Center would also expand Mid-Pacific’s understanding of assessment and evaluation, the relationship between technology and learning, and environmental sustainability.

As of the completion of my dissertation, Mid-Pacific Institute has become the first school in Hawai‘i to have access to 3D laser scanning for historic preservation, in conjunction with a technology foundation whose mission is to digitally scan and preserve the world’s natural and man-made treasures in the next five years. This recent development has come about because of the innovative, entrepreneurial leadership of Mid-Pacific’s current school president. As a Technology Center, Mid-Pacific has acquired LiDAR 3D laser scanners and is the only K-12 school in the world to use such high-end engineering technology. A project in its planning stage
is to scan Hawai‘i’s voyaging canoes (Hōkūle‘a and Hawai‘i Loa) and artifacts housed in Bishop Museum so that access to historic artifacts for educative purposes is possible for every citizen of every age in the world.

Mid-Pacific’s middle school is undergoing programmatic re-structuring in order to be better prepared to receive their own elementary students who are matriculating into middle school with cognitive skills and mindsets that require more focus on collaborative learning, inquiry approaches, and assessments in the service for learning. There is increasing attention on the curriculum and instructional practices in transition grades (fifth grade to sixth grade and eighth grade to ninth grade). Through Kupu Hou and financial resources committed to schoolwide professional development, the faculty will focus on math and science curricula at all grade levels and continue efforts on deepening faculty understanding on the assessment of student learning.

It has taken Mid-Pacific ten years to begin thinking of ourselves as one school with one institutional identity since the merger of Epiphany School, and nearly twenty years of internally “merging” the middle school school with the high school. Ironically, the first merger process between Mills Institute and Kawaiaha‘o Seminary took nearly thirty years before they could authentically identify as Mid-Pacific Institute. Considering the multi-layered political, economic, social, and emotional complexities fully explored in this dissertation, it is essential that the human dimension of a merger be given as much, if not more, consideration as the legal and financial processes.
During meetings with parents interested in applying their children to Mid-Pacific, the director of admission usually reminds parents that “Mid-Pacific Institute is not the same school it was a hundred years ago, fifty years ago, even five years ago . . . we are constantly changing . . . .” A high school teacher best captures this image of Mid-Pacific’s identity today:

The culture of a community that shares and talks with each other is an identity for us that’s changing — how we see ourselves on campus and how we treat each other and how we learn from each other and talk about the work we’re doing. That’s transforming the culture of our organization. And I think that’s the view with the kids who have never felt better about being learners here on this campus like now. I mean that’s really something. (high school faculty)

The serendipitous merger of Epiphany School and Mid-Pacific Institute has become a powerful integration of two cultures into one synergistic school identity that continues to evolve. We anticipate organizational struggles that will necessitate negotiations in processes and procedures, though it will be critical to anchor our decisions in our shared assumptions, beliefs, and values about teaching and learning. Still, there is momentum, and today, the future is brighter.
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APPENDIX A

LIST OF INTERVIEW QUESTIONS

1. Since 2003, what has been your role in relationship to MPI?

2. How would you define school identity?

3. What was MPI’s identity before the acquisition of the elementary school?

4. In what ways do you think the acquisition or merge of the elementary school has affected MPI’s identity?

5. In the first 2-3 years of the onset of the elementary school, were there any challenges?
   5a. If so, what were they?

6. What do you think caused or led to these challenges?

7. How were the challenges overcome? resolved?

8. What are recent challenges MPI has encountered that you think have anything to do with the elementary becoming part of MPI?

9. What do you think has caused or led to these recent challenges?

10. How are these challenges being resolved?

11. What metaphor do you think best describes MPI’s identity? What makes you say that?
APPENDIX B

CONSENT FORM

Consent to Participate in Research Project: Coming-to-Know: Evolving a School Identity

My name is Edna L. Hussey, principal of Mid-Pacific Institute’s preschool and elementary division. I am a doctoral candidate at the University of Hawai‘i. This project is required to complete my dissertation, an action research project, for my doctorate of education degree. The purpose of my research project is to investigate the merger of two Hawaii independent schools (Epiphany School and Mid-Pacific Institute), the impact and challenges of the merger on the combined school community, and the ways in which the school’s identity is evolving. I am interested in finding answers to these questions: What happens when two school cultures merge? How is school identity affected? What shapes school identity? Of what consequence is institutional identity? I am asking you to participate in this project because of your involvement, expertise, and/or experiences during the ten-year framework, from 2002-2012, of the proposed study.

Project Description — Activities and Time Commitment: If you participate, I will interview you in a face-to-face meeting, 30-60 minutes. I will record the interview using a digital audio-recorder. I am recording the interview so I can later type a transcript — a written record of what we talked about during the interview — and analyze the information from the interviews. If you will participate, you will be one of up to 25 participants who I will interview individually or in small groups. One example of the type of question I will ask is, “What were challenges related to the school’s acquisition that you believe were the result of the acquisition?” If you would like to preview a copy of all the questions that I will ask you, please let me know.

Benefits and Risks: I believe the direct benefit to you in participating in my project is that you will be given an opportunity to reflect on the merger and to voice your opinion and insights. The results of the project will impact the school community in providing an explanation of Mid-Pacific’s evolving identity among other independent schools in Hawai‘i and across the nation, as well as providing a study for schools facing similar challenges of identity, closure, or program development. I believe there is little or no risk to you in participating in this project. If, however, you are uncomfortable or stressed by answering any of the interview questions, we will skip the question, or take a break, or stop the interview, or withdraw from the project altogether.

Confidentiality and Privacy: During this research project, I will keep all data from the interviews in a secure location. Only I will have access to the data, although legally authorized
agencies, including the University of Hawai‘i Human Studies Program, have the right to review research records.

After I transcribe the interviews, I will erase audio-recordings. When I report the results of my research project, and in my typed transcripts, I will not use your name or any other personally identifying information. Instead, I will use a pseudonym (fake name) for your name. If you would like a summary of the findings from my final report, please contact me at the number listed near the end of this consent form.

**Voluntary Participation:** Participation in this research project is voluntary. You can choose freely to participate or not to participate. In addition, at any point during this research project, you can withdraw your permission without any penalty of loss of benefits.

**Questions:** If you have any questions about this project, please contact me via phone (808) XXX-XXXX (cell) or (808) XXX-XXXX (office) or e-mail (XXXXXX). If you have any questions about your rights as a research participant in this project, you can contact the University of Hawai‘i Human Studies Program, by phone (808) 956-5007 or by e-mail at uhirb@hawaii.edu.

Please keep the prior portion of this consent form for your records.

If you agree to participate in the project, please sign the following signature portion of this consent form and return to me in the enclosed envelope, or electronic scan to XXXXXX no later than May 17, 2013.

______________________________TEAR OR CUT HERE__________________________

**Signature for Consent:**

*I agree to participate in the research project entitled “Coming-to Know: Evolving a School Identity.” I understand that I can change my mind about participating in this project at any time by notifying the researcher.*

**Your name (print):** ________________________________________________

**Your signature:** ___________________________________________ Date: _____________
“Alan” is a case study in itself. He was one of the MPI individuals I knew who did not embrace the idea of the elementary merging with MPI. In the interview, I understood why. He explained that the elementary was the reason the dorm program closed, and he was a freshman living in the dorms before MPI started taking in day students, likely for financial reasons. The dorm program was thriving up until the late 80s and 90s. Economics perhaps. A change in the times. But “Alan” was also a child of MPI. His father was dean, counselor, math chair, etc. who lived on campus with his family — “Alan” and two other siblings. He described the 34 acres of MPI as his playground. Biking across campus. Swimming in the school pool. Hanging out with the dormers. Dorm life when MPI was exclusively a forming program was a much-prized opportunity. Dormers were a family. They lived together, ate 3 meals daily together, socialized together on weekends, even when they could go home. It seemed to be an idyllic life, as “Alan” remembers. When the elementary building went up to replace the dorm facilities, it also meant the end of life at MPI that “Alan” and other alumni revered. Epiphany/elementary came on board without a transition process. We arrived on campus en masse — nearly 200 of us, students, faculty, staff combined — with our traditions, our instructional approaches, our educational philosophy. He referred to this time as a long period of adjustment, finding the term ‘challenge’ as too strong a word. He described the elementary as being adopted, and with this term, a kind of stigma as being adopted kids trying to fit in with an existing family. At the end of his interview, he also felt that the president’s work in bringing the elementary was one of the best things to happen to MPI because now students from an early age would be more loyal to MPI. Loyalty seemed to be very important to “Alan.” He did admit that this merger was still very emotional for him in the sense of losing the boarding program and bringing about changes to his notion of what MPI had been and could never again be the same as he had experienced. For him, the elementary = change = loss = emotional upheaval. Only once did he admit that the transition was probably even harder for the elementary folks.
APPENDIX D

ANALYTIC MEMO (SAMPLE)

1.22.14

by Edna L. Hussey

Having read and done preliminary analysis of a variety of interviewees (Board member, former Epiphany faculty now MPI faculty, MPI VP, alums, former Director of Admissions, recent MPI alum who was a student during the merger process), I am seeing the sheer complexity of many factors competing and coalescing in strategic and non-strategic ways. As one interview put it — "making lemonade of lemons."

Consistent among all interviews was the "re-discovery" or constructing of meaning from the experiences of the merging process, 2002-2004. It was the first time that each person had ever been asked their opinion of the closing Epiphany and merging with MPI. This was a shared experience with multiple perspectives, which, taken together, provides a more complete understanding of what happens when two well-established communities come together for economic reasons at first and from which is created a new entity, not a blended community, but each transformed, better in many ways. I was humbled to have provided this opportunity for them to reflect aloud, with me, their feelings about an event that affected them as teachers, alums, Board members, parents.

There really is no way but addressing the emotional factor in this merger. Interviewees used words like reluctance, fear, worry, happy, anger to describe their own emotions. The History of MPI as written by Gay Pratt wrings the emotion from the years of change at MPI, especially the merging of Kawaiahaʻ206o Seminary for Hawaiian Girls and Mills Institute for Asian students. Interviewees freely spoke of their emotional attachment or emotional response to situations. In this narrative, I’d like to address the emotional content of the merger.
I’m getting that school identity, in the case of MPI, is constantly evolving. Identity is shaped by the individuals who constitute a school and the events that occur. Identity is connected to place, geography, history, culture.

The different perspectives from interviewees are likened to concentric circles. Those closest to the event were most impacted (teachers, parents, but not so much students) and those further away like the Board members had a more Pollyana view of the merger. (Note to myself: I need to decide what to call this: merger or acquisition, for consistency through the writing). Less emotion further away.

Of all the metaphors, the ones I think most apropos are soup, a rainbow. Both convey the idea of not really knowing what lay ahead for either Epiphany or MPI (the elusive rainbow constantly moving as it is approached; a murky soup of different ingredients). Both metaphors describe positivity even in the unknown ("The soup tastes great" or "the pot of gold at the end of the rainbow"). Not being able to define what MPI is seems to be a paradox because defining who we are seems to be elusive because we are constantly changing. Apparently, not being able to define who and what we are seems to be an issue for — Board? admin? PR of the school? students?
APPENDIX E

Excerpts of Student Reflections from *The Heart of Epiphany, 2003-2004*

“Leaving”

The jet black asphalt burning in the boiling sun
Just waiting for the first set of rubber wheels to roll over it
Rocks rolling in all different directions
Crunch crunch goodbye

- C.L., grade 6

I love the places next to Mr. P.’s house and next to Ms. R.’s house because there are seats you can sit down on. There’s some air you can breathe. When it’s recess, I can find bugs.

- D.U., kindergarten

I love the secret passage because there’s stairs and a door. I’ve never been down the secret passage. I heard there’s a library down there.

- S.H., kindergarten

When I was in kindergarten and 1st grade, I didn’t really like the Art House, but when I was in 2nd grade, I liked Art but didn’t know why. In the Art House, I drew 248 monsters and 106 baby inanimate object monsters. I’m really proud of the monsters I make. I also made my mini model of Hawai’i there. The Art House is a special place to me.

- M.A., multi-age grade 3-4

I like the loft because I like stuffed animals and puppets. I like to be high. I also like to play house. Almost all of the games we play, we pretend we live in a house, but in the loft I don’t have to pretend.

- J.R., multi-age grade 1-2

One place that is the heart of Epiphany to me is the grassy area. It is one of the quietest places at school. When I first came to Epiphany in second grade, I really wanted to sit there instead of in class. The best part about it is that no one will bother you. If I have something on my mind and I need to think about it, I can go there. I sometimes just need some quiet time. Everyone needs some quiet time once in a while.

- C.W., grade 5